

# Workday Talent & Performance Training

Department Chairs & Deans



# Training Guidelines

- This session is recorded
- Close your Email, logout of IM, and turn cell phones off or put them away
- A break has been built into our schedule
- If you have a question or technical issue, come off mute or use the chat
- We will use a parking lot to keep us on track
- Log in as yourself for practice activities
- Try not to work ahead

# Agenda

- Introductions
- Course Overview
- General Navigation
- Talent & Performance Overview
  - Goals and Expectations
  - What's Changing
- Performance Reviews
  - Process Overview
  - How to Start a Performance Review
  - How to Complete the Performance Review
  - How to view the Status of a Performance Review
- Support Resources
- Q&A

# Your Instructor



- Tammy Srom
- Organizational Change & Training Principal Consultant with Collaborative Solutions
- Fun Facts:
  - Tampa, FL
  - (Usually) Enjoy traveling
  - Movies & TV
  - Playing with my dog Kiefer





## Please Share:

- Name
- Role at MC
- Favorite vacation destination

# Our Objectives

Our objectives are things we will accomplish by the end of this training

- Review key concepts for Workday navigation
- Gain an understanding of the Talent & Performance functionality
- View demonstrations of key Workday processes
- Successfully complete activities for key Workday processes

# Our Format

- Our class will consist of one, two-hour sessions focused on Workday Talent & Performance concepts and transactions

## Tell

- Background and context



## Show

- Guided demonstrations of the process initiation and/or completion



## Do

- Practice the process with hands on activities



# Training Tenant Notes

- This is a test environment specifically for training
- Nothing you do today will affect any real Montgomery College employees or processes
- Some data in this environment is staged for training and may be slightly different from real-world data
- Do not share your login information with anyone





# Class Resources

- Training Tenant Credentials
- Activity Guide
- [Link to PDF version of the PowerPoint Presentation](#)

# Home Page

Notifications

Account Options

The screenshot shows a web application interface for Montgomery College. At the top left is the MC logo and a search bar. The top right contains a grid icon, a notification bell with a '6' badge, an envelope icon with a '1' badge, and a cloud icon. Below the navigation bar is a purple banner with a collage of student photos. A white welcome message reads 'Welcome, Cam Department Chair' with a settings gear icon. The main content area is split into two columns. The left column features an 'Inbox' card with a printer icon, '1 item', and a message snippet: 'Manager Evaluation: Part-time Faculty Review: Fran Faculty 1 hour(s) ago - Effective 05/03/2021'. A 'Go to Inbox' link is at the bottom of the card. The right column features an 'Applications' card with a puzzle piece icon and '18 items'. Below this is a 3x4 grid of application tiles: Benefits, Learning, Recruiting, Current Benefit Elections, Pay, Personal Information, My Team, My Team Management, Directory, Birthdays (with a '2' badge), Anniversaries, and Career.

Search

Quick Access

Inbox

Return to home page

Inbox

Applications

# Tools & Navigation



Applications

Q Search

Search

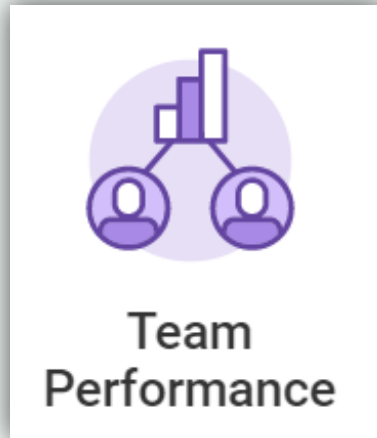
Actions

Related  
Actions



Return to  
Homepage

# Team Performance Application



- View Performance Review Status
  - Not Launched
  - In Progress
  - Complete
- Take Action
  - Add Goal to Employee
  - Employee Reviews
  - Give Feedback
  - More...
- Track Team Goals

# Accessing Workday

Let's log in

Log in to training tenant

<https://impl.workday.com/wday/authgateway/mc5/login.html>

Use the Username & Password that were emailed to you

# Workday Demo

In this Guided Demonstration, we will cover:

- Basic Navigation



# Workday Activity

## Navigate Workday

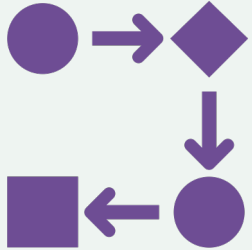
Support Materials:

- Activity Guide #1

Training resumes at XX:XX



# Key Concepts



- **Business Process (BP)**

- A sequence of steps in a process flow needed to initiate and complete a task
- Tied to Workday security
- Automatic routing to responsible roles
- Configuration built to align with Montgomery College needs



- **Security**

- “Permissions” or “access rights” for users with an appropriate role can initiate a BP
- Role Based: Assigned to the position, follows the job not the person
- User Based: Assigned at the individual level, follows the person regardless of the job



# Talent & Performance Overview

# Vision



## MC's Mission, Vision, Values

### MISSION STATEMENT

We empower our students to change their lives and we enrich the life of our community. We are accountable for our results.

### VISION STATEMENT

With a sense of urgency for the future, Montgomery College will be a national model of educational excellence, opportunity, and student success. Our organization will be characterized by agility and relevance as it meets the dynamic challenges facing our students and community.

### CORE VALUES

EXCELLENCE \* INTEGRITY \* INNOVATION \* DIVERSITY \* STEWARDSHIP \* SUSTAINABILITY

*(Adopted by the Board of Trustees on June 20, 2011.)*

# Talent & Performance Timeline

July 2021

- Goals
- Feedback
- Talent Review
- Development Plans
- Performance Improvement Plan
- Disciplinary Action

Fall 2021

- **PT Faculty** New Hires in August have reviews due March 2, 2022
- **FT Faculty** Reviews initiated in September/October

February/March 2022

- Talent Administrator launches Administrator and Department Chair Reviews

# Overview of Changes

Currently	Workday
<ul style="list-style-type: none"><li>• Performance reviews/evaluations are launched at different times depending on the Employees position</li></ul>	<ul style="list-style-type: none"><li>• Performance review timing remains the same</li><li>• Increase in consistency across departments</li></ul>
<ul style="list-style-type: none"><li>• PT and FT faculty meet with the Department Chair or Dean to review the timeline and observers</li></ul>	<ul style="list-style-type: none"><li>• All faculty will still meet with their Department Chair or Dean prior to the review being launched</li></ul>
<ul style="list-style-type: none"><li>• Some part-time faculty review process steps are inconsistent across campuses</li></ul>	<ul style="list-style-type: none"><li>• Workday provides a consistent process to complete part-time faculty reviews across all campuses</li></ul>
<ul style="list-style-type: none"><li>• All faculty reviews are a manual paper process.</li></ul>	<ul style="list-style-type: none"><li>• Workday provides an online process for faculty reviews</li></ul>
<ul style="list-style-type: none"><li>• HRSTM receives a list of re-appointments that are contingent upon Performance Reviews</li></ul>	<ul style="list-style-type: none"><li>• HRSTM-Records will receive re-appointment notices timely. Worksheets will continue to be submitted to HRSTM-Records outside of Workday</li></ul>

# Need to Know

- New Hire PTF Review Schedule
  - **Fall New Hire:** Reviews due March 1st - if acknowledgement is not completed by Feb. 10th, contact HR Talent Administrator to Advance review along with reason why review was not acknowledged
  - **Spring New Hire:** Reviews due July 1 (PTF may not be available after semester ends) with a Sept. 15th submission with all acknowledgements; notify HR Talent Administrator by August 30th to Advance review along with reason why review was not acknowledged.
- Good Faith Consideration - SEIU 7.3 (C) 4
  - An Unsatisfactory/Does Not Meet Performance review may impact a PTF good faith consideration.

# Performance Review Process

# Part-Time Faculty

- The Department Chair meets with faculty member to review timeline and identify full-time faculty member in the department who will conduct the classroom observation before launching the Start Performance Review.
- During the first semester of teaching or counseling/advising at least once every three years, the part-time faculty will be observed by a full-time faculty member in the department. More frequent observations may be required by the department chair or the dean. P&P 36001.V.
- The part-time faculty member will undergo a comprehensive evaluation every three years at a minimum, consisting of a review of the following:
  - Classroom observations/advising, counseling observations
  - Student evaluation information on file
  - Review of instructional materials on file (e.g., syllabi, handouts, tests, assignments)
  - Any other materials the part-time faculty member chooses to submit

# Full-Time Faculty

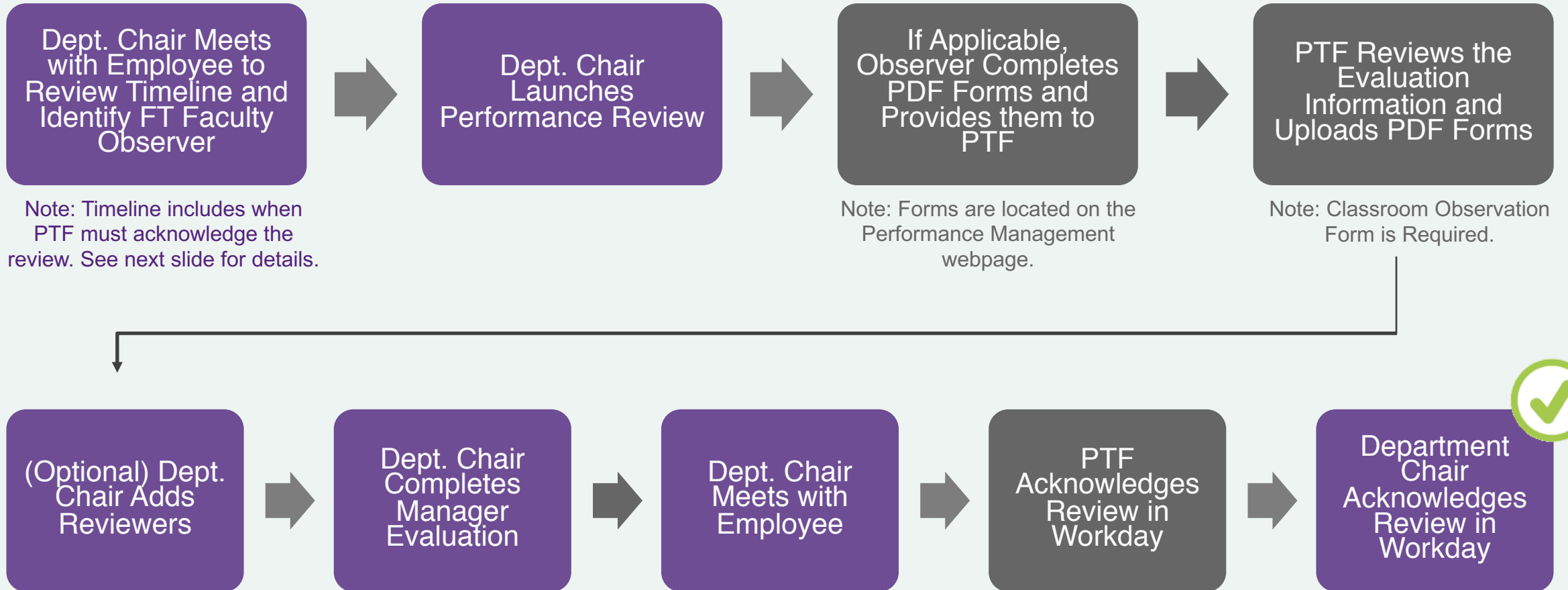
- The Dean meets with faculty member to review timeline, names of peer reviewers and classroom observers before launching the Start Performance Review.
- The elements of the instructional faculty and counseling faculty performance review include a self-evaluation, student evaluations, peer reviews and observations, and an administrative evaluation.
- The purposes of performance reviews are to:
  - Promote the highest quality instruction (teaching/learning)
  - Encourage the highest quality performance by faculty
  - Encourage professional growth and development of faculty
  - Assess strengths and weaknesses in faculty performance
  - Assess service to the College community (beginning with the 2-year evaluation)
  - Promote the highest quality of counseling and advising (for counseling faculty performance review)



# Focus Areas of Review

<b>Instructional Faculty</b>	<b>Counseling Faculty</b>
<ul style="list-style-type: none"><li>• Teaching materials, including syllabi, and mastery of subject matter</li><li>• Teaching techniques</li><li>• Instructor's knowledge of subject matter</li><li>• Instructor's availability to students</li></ul>	<ul style="list-style-type: none"><li>• Advising</li><li>• Counselor's techniques</li><li>• Counselor's knowledge and expertise in the dynamics of student needs</li></ul>
<b>All Faculty</b>	
<ul style="list-style-type: none"><li>• Individual and unit responsibilities</li><li>• Academic and/or activity responsibilities</li><li>• Other responsibilities and activities, such as curriculum development, textbook review and selection, and program accreditation</li><li>• Interpersonal relations</li><li>• Professional growth and development</li><li>• Professional contributions and achievement</li><li>• Service to the College community</li><li>• Progress on individual annual objectives</li><li>• Submission of non-instructional assessment data (CAR and OA) in accordance with established deadlines</li><li>• Timely submission of student grades and participation in assessment practices</li></ul>	

# Process Flow: Part-Time Faculty Performance Review



# Timeline for Acknowledgement

**Important:** If Employee acknowledgement is not received by the deadline, contact HR Talent Administrator to advance the review and include a reason why it was not acknowledged

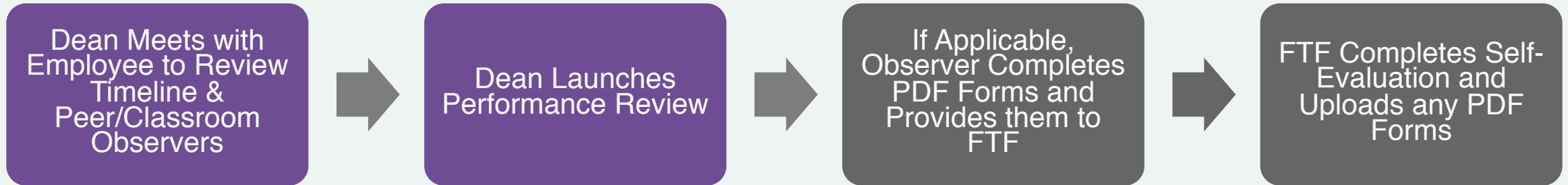
## Fall New Hires

- Reviews due March 1<sup>st</sup>
- **Acknowledgement deadline is February 10<sup>th</sup>**

## Spring New Hires

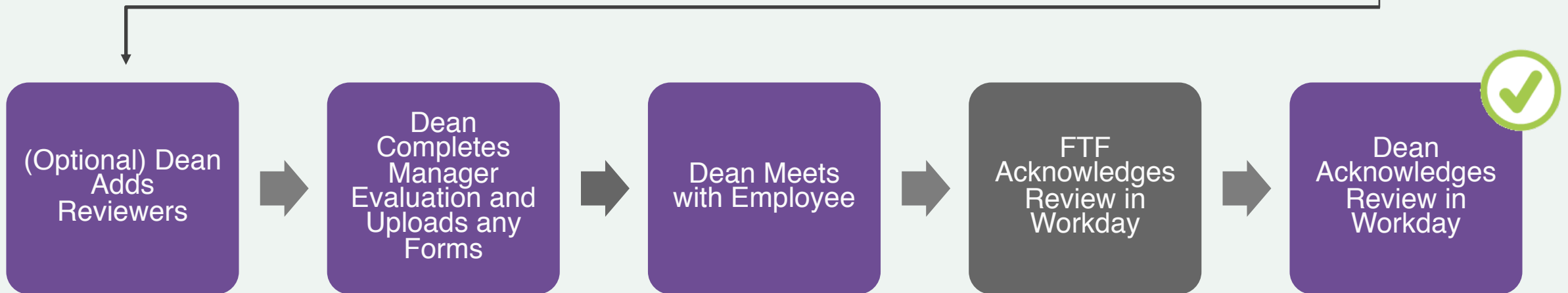
- Reviews due July 1<sup>st</sup> (PTF may not be available after semester ends) and submit by September 15<sup>th</sup>
- **Acknowledgement Deadline is August 30<sup>th</sup>**

# Process Flow: Full-Time Faculty Performance Review



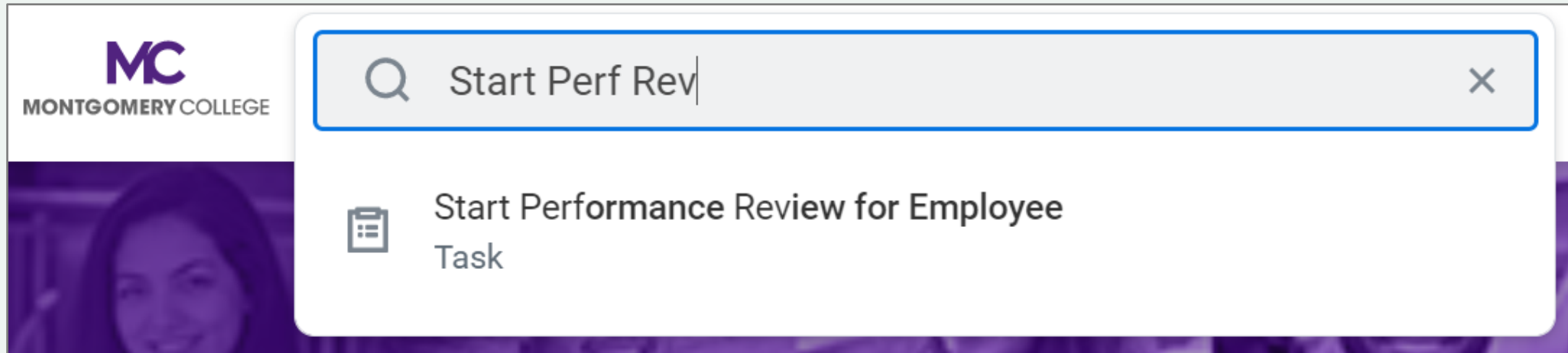
Note: Timeline includes when PTF must acknowledge the review. See next slide for details.

Note: Forms are located on the Performance Management webpage.



# Start Performance Review

- Locate the task from the Workday search bar



# Start Performance Review

- Select the following details:
  - **Employee:** Select from team's that are part of your organization(s)
  - **Review Template:** Select the applicable template
    - Part-Time Faculty Review
    - FT Faculty > Counseling Faculty Performance Review
    - FT Faculty > Instructional Faculty Review
  - **Review Dates:** Enter the start and end dates for the review period
- Click Submit

## Start Performance Review for Employee

Employee \*

Review Template \*

Period Start Date \*

Period End Date \*

# Workday Demo

In this Guided Demonstration, we will cover:

- Start Performance Review



# Workday Activity

## Start Performance Review

Support Materials:

- Activity Guide #2

Training resumes at XX:XX





# Overview of Employee Point-of-View

Complete  
Inbox Task

Meet with  
Chair or Dean

Acknowledge  
Review

- **PT Faculty Evaluation:**
  - Supporting Documents  
(*Observation Form is required*)
  - Feedback
  - Evaluation
  - Summary
- **FT Faculty Self-Evaluation:**
  - Self-Evaluation
  - Goals
  - Feedback
  - Supporting Documents
  - Overall (Optional)
- Discuss the review
- In Workday, they acknowledge the review and can choose to leave comments

## Employee Acknowledgement

Status \*

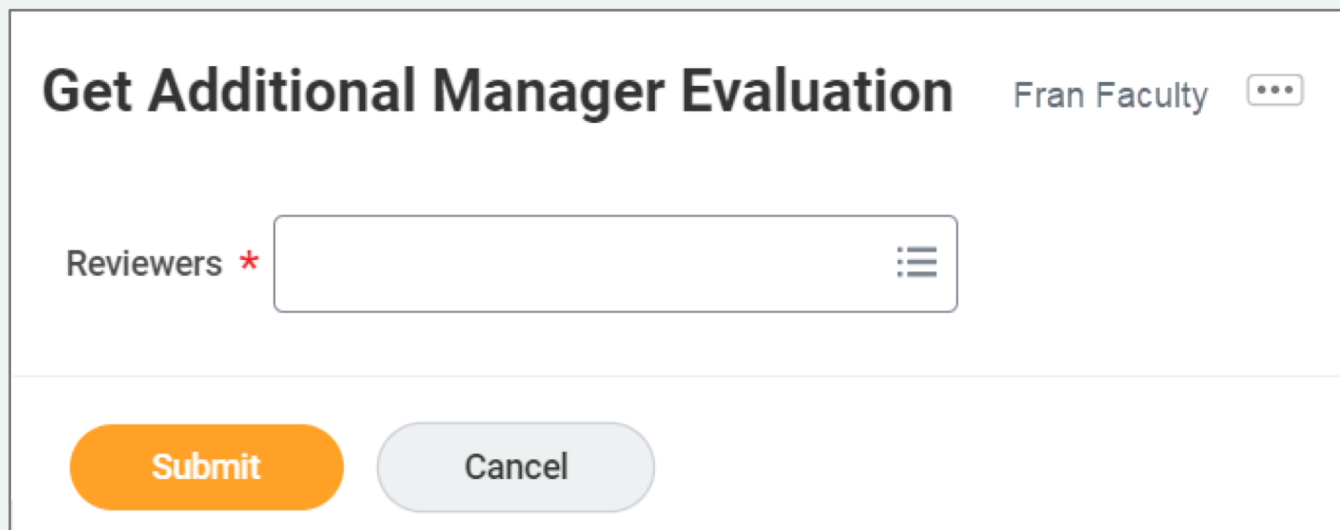
Acknowledge Review without Comments

Comment

# Get Additional Manager Evaluation

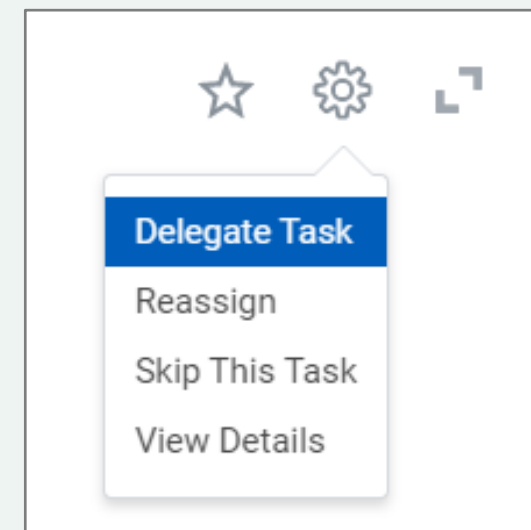
- You receive a Workday Inbox task to “Get Additional Manager Evaluation”
- You can add reviewers or skip the task

## Add Reviewer



The screenshot shows the 'Add Reviewer' interface for the task 'Get Additional Manager Evaluation'. The task title is displayed in bold black text, followed by the assignee 'Fran Faculty' and a three-dot menu icon. Below the title is a text input field labeled 'Reviewers \*' with a red asterisk and a list icon on the right. At the bottom of the interface are two buttons: an orange 'Submit' button and a grey 'Cancel' button.

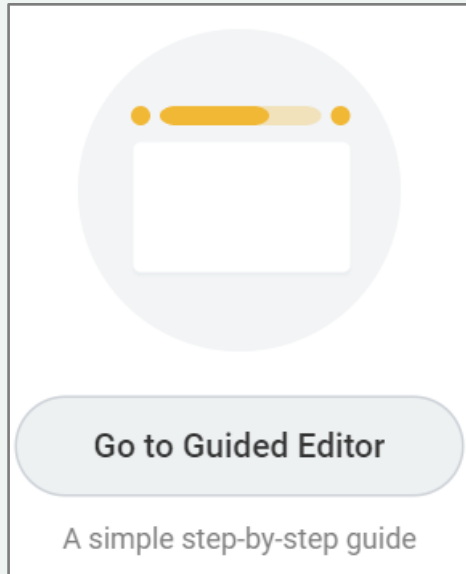
## Skip the Task



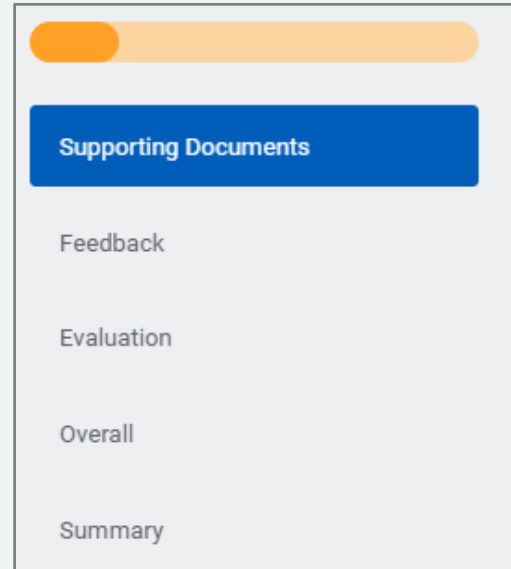
**Note:** You can select one or more people. If adding multiple reviewers, add them all at the same time.

# Complete Manager Evaluation

Begin the Task

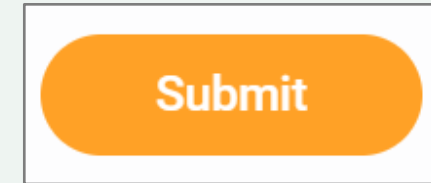


Complete Each Section



Section content varies depending on the selected review

Review & Submit



Other actions include:

- **Send Back:** Sends the task back to the Employee to complete information
- **Save for Later:** Saves your work for you to continue later
- **Close:** Closes the task and saves any sections you completed

# Meet with Employee

- All “*To Do*” tasks in Workday require 2 steps:
  1. Read the **Instructions** and complete the action (meet with the employee)
  2. Return to the Inbox task and click **Submit**
- Discuss the review, including all required forms:
  - Observation forms
  - Peer Review forms
  - Chair forms
  - (For Counseling) Individual Student Observation form
- Once you submit, the employee receives a Workday Inbox task to acknowledge the review. Once they submit, you receive a task to acknowledge the review

### Complete To Do


[Meet with your employee](#) ⋮

**For** [Fran Faculty](#)

**Overall Process** [Part-time Faculty Review: Fran Faculty](#)

**Overall Status** In Progress

**Instructions** Please meet with the employee to discuss the evaluation. Submission of this task will release the evaluation to the employee in Workday and prompt them to acknowledge the evaluation.



# Workday Demo

In this Guided Demonstration, we will cover:

- Complete Manager Evaluation Steps for Performance Review



# Workday Activity

## Complete Manager Evaluation

### Support Materials:


- Activity Guide
  - #3a = Chairs
  - #3b = Deans

Training resumes at XX:XX

# Acknowledge & Finalize

**Reminder:** If Employee acknowledgement is not received by the deadline, contact HR Talent Administrator to advance the review and include a reason why it was not acknowledged.

[performance@montgomerycollege.edu](mailto:performance@montgomerycollege.edu)

Acknowledgement	
<b>Manager Acknowledgement</b>	<b>Employee Acknowledgement</b> 
Status *	Status
Acknowledge Review without Comments	Acknowledge Review without Comments
Comment	Comment
	Entered by
	Fran Faculty
	Date
	09/03/2021 03:54 PM

You select a Status and, if applicable, enter a Comment

The Status and Comment entered by the Employee display

# View Status

Process History					
12 items					
Process	Step	Status	Completed On	Due Date	Person
Start Performance Review	Start Performance Review	Step Completed	04/12/2021 11:00:41 AM		Cam Department Chair
Start Performance Review	Complete Self Evaluation	Not Required			
Complete Self Evaluation for Performance Review	Complete Evaluation	Submitted	04/13/2021 01:36:34 PM		Fran Faculty (Employee As Self)
Start Performance Review	Get Additional Manager Evaluation	Submitted	04/13/2021 01:53:56 PM		Cam Department Chair
Complete Manager Evaluation for Performance Review	Complete Manager Evaluation for Performance Review	Submitted	04/13/2021 02:17:16 PM		Cam Department Chair
Complete Manager Evaluation for Performance Review	To Do: Meet with your employee	Step Completed	04/28/2021 06:06:00 PM		Cam Department Chair
Complete Manager Evaluation for Performance Review	Provide Employee Review Comments	Submitted	04/28/2021 06:09:14 PM		Fran Faculty (Employee As Self)
Complete Manager Evaluation for Performance Review	Provide Manager Review Comments	Submitted	04/28/2021 06:24:06 PM		Cam Department Chair



# Workday Demo

**In this Guided Demonstration, we will cover:**

- View Status of Performance Review



# Knowledge Check

1. When are Part-Time Faculty members reviewed?
2. When are Full-Time Faculty members reviewed?
3. What attachment is required for the review?
4. Where are the required form(s) found to attach?
5. Where can you check the status of a review?

# Support Resources

## On-Demand Materials

- Project Webpage
  - Job Aids
  - FAQs

## Training Sessions

- Workday Learning
  - Session Recordings

## Questions

- IT Help Desk Ticket

# Training Survey

- You will receive a link to a training survey
- Please take a few minutes to provide your feedback
- Your responses helps us improve the course



**Thank You**

Enjoy your Workday!

**Time for  
a 5-Minute  
Break**

