Staff Year-end Performance Management Toolkit for Managers

As of

March 11, 2026

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Performance Review Timeline

Review	Review Period	Launch Date	Completion Date
Spring 2026 Year-End Review	**May 1 – Apr. 30 (12 months)**	**Wed, Apr. 1, 2026**	**Sun, May 31, 2026**

Schools and centers may set interim dates for the completion of self-evaluation, manager evaluation, and the employee/manager conversation to facilitate the timely completion of the review process.

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Who's Eligible?

All Staff

With these exceptions:

- Staff covered by collective bargaining agreements
- Penn Medicine clinicians, residents, interns
- Staff on long-term disability (LTD) as of April 1, 2026
- New staff hires and internal hires who are in the middle of or have recently completed their introductory review periods

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Provide a Good Experience for New Staff Hires

APPROPRIATE: Year-end Performance DOES NOT LAUNCH. If the scheduled end date for an introductory period is **on or after March 2**, Workday will automatically **prevent the year-end review from launching** on April 1.

INAPPROPRIATE: Year-end Performance DOES NOT LAUNCH. Lingering, in-progress introductory period reviews with scheduled end dates **before March 2** prevent the launch of a new review process for these relatively new hires. **ACTION IS REQUIRED.**

Your school or center may contact you if you have staff with **lingering, in-progress** intro period reviews.

1. **ACTION**: You must complete all three reviews of the introductory period process **before April 1.**

OR

2. **ACTION: Your school or center** must cancel the intro period process **before April 1.**

4. **ACTION: After April 1, your school or center** must take manual action (cancel intro, launch year-end) for staff who have **lingering, in-progress intro period reviews,** which prevent the launch of the year-end performance review.

Competency Ratings

- Everyone has the same five University-required competencies.
- Each staff member* also has five competencies, specific to the job family.
- Behaviorally Anchored Rating Scales (BARS)

University-required Competencies	Ensures Accountability
	Collaborates
	Communicates Effectively
	Customer Focus
	Values Differences

Proficiency Ratings	Examples
• Needs Improvement • Meets Expectations • Exceeds Expectations * Not Applicable (a choice only for job family competencies)	Specific BARS are provided for each competency, at appropriate levels, within the review. More information on the Competency Library on the Penn HR website.

Updated Performance Ratings

Increase from 4 to 5 Ratings and Definitions, effective April 1, 2026

Performance Rating	2026 Definitions	2023-2025 Definitions
Exceeds expectations	Consistently delivered exceptional results beyond set goals and regularly surpassed standards for timeliness, quality, and/or resource utilization.	Successfully met all goals and regularly surpassed standards for timeliness, quality, and/or resource utilization.
Meets and occasionally exceeds expectations	Successfully met all goals, consistently met and occasionally surpassed standards for timeliness, quality, and/or resource utilization.	
Meets expectations	Successfully met all goals, consistently met standards for timeliness, quality, and/or resource utilization.	Successfully met all goals, consistently meeting standards for timeliness, quality, and/or resource utilization.
Meets some but not all expectations	Acceptable performance overall, though did not meet some goals or sometimes fell short of standards for timeliness, quality, and/or resource utilization. The manager should create a performance improvement plan.	Acceptable performance overall, though did not meet some goals or sometimes fell short of standards for timeliness, quality, and/or resource utilization. Manager should describe action steps for improvement.
Does not meet expectations	Did not meet most goals and/or often fell short of standards for timeliness, quality, and/or resource utilization. The manager should create a performance improvement plan.	Did not meet most goals and/or often fell short of standards for timeliness, quality, and/or resource utilization. Manager should describe action steps for improvement.

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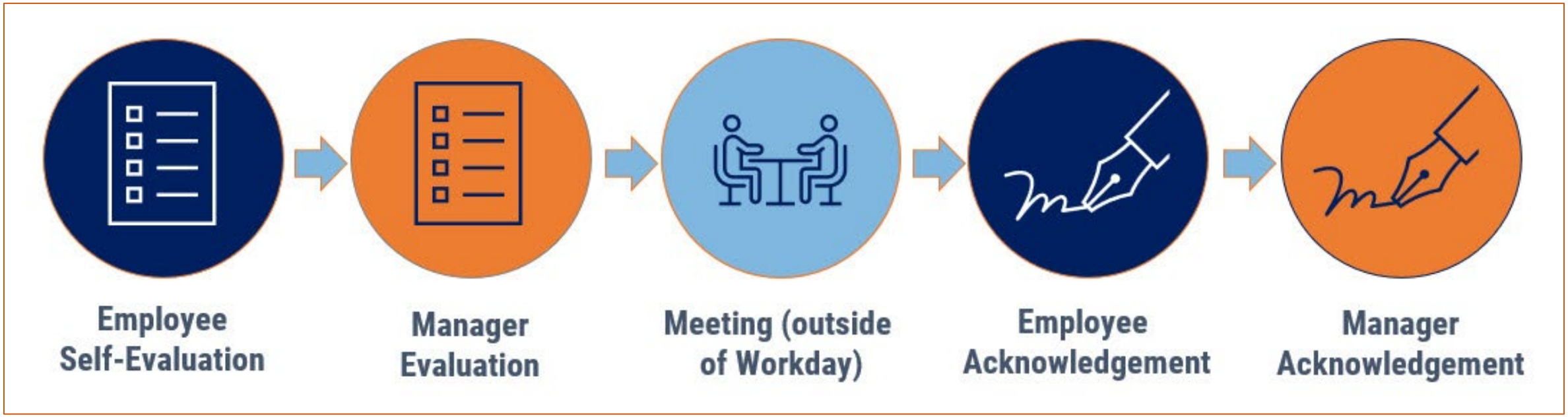
Four Workday Steps and a Conversation



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Summary of Required Steps

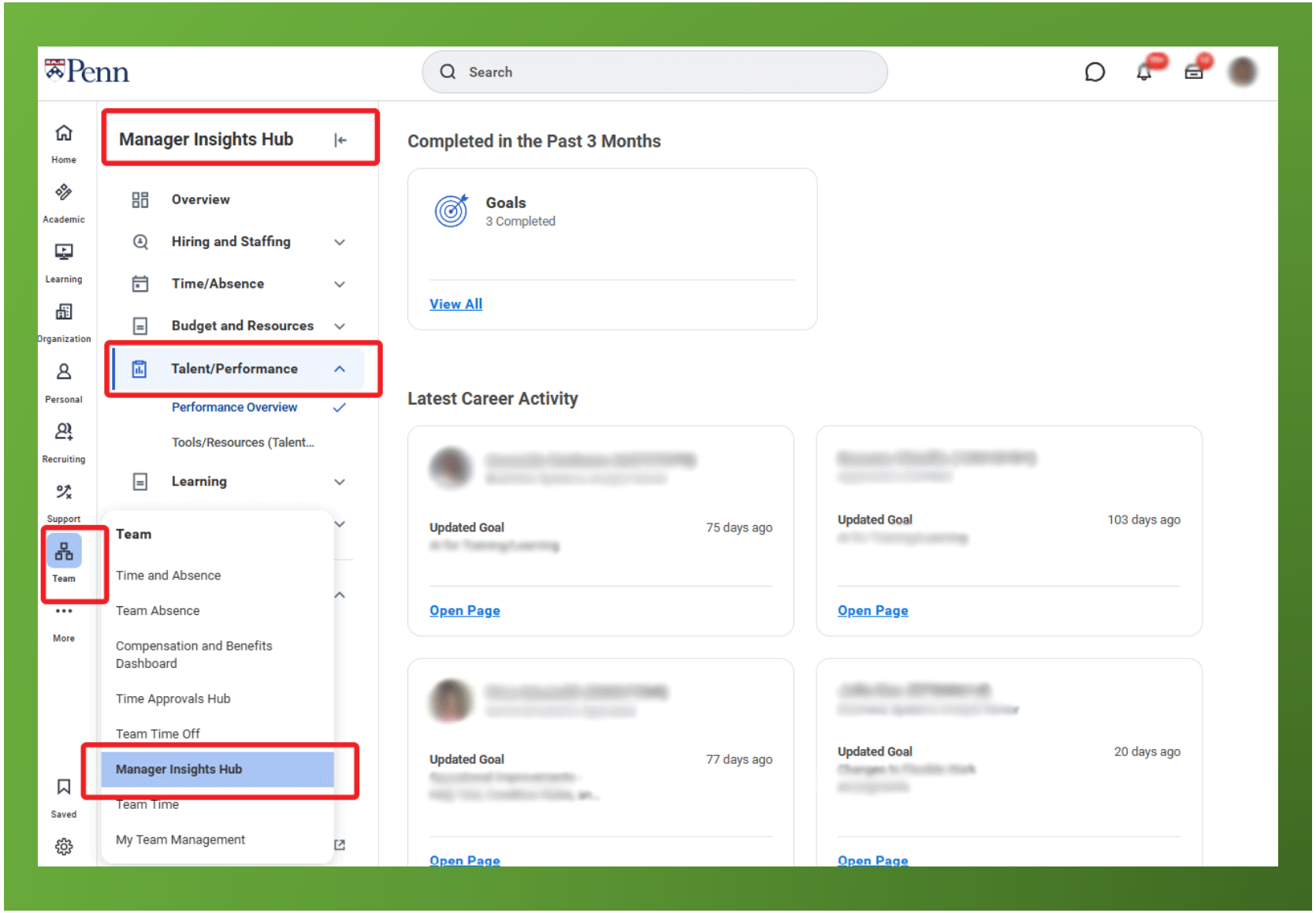
Step	Minimum Requirement		Description
	Fall Mid-Year Review	Spring Year-End Review	
Goals	✓	✓	All goals must have an evaluation comment entered by the employee and manager. Comments from the 'last completed review' will prepopulate.
Feedback Questions	✓	✓	Mid-year: Six questions require a response from employee and manager Year-end: Five questions require a response from employee and manager
Competencies with Ratings	✓	✓	Select an appropriate rating for each.
Supporting Documents			Upload file(s)
Overall Performance Rating		✓	Select an appropriate rating
Staff-Manager Meeting	✓	✓	Outside Workday, discuss performance review and staff career growth
Acknowledgement	✓	✓	Acknowledge

Overview of Resources

Human Resources on www.hr.upenn.edu		Workday on www.workday.upenn.edu, Workday and Workday Learning	
Policies	• Introductory Period • Internal Hire • Performance and Staff Development Program	**Process Guides**	• Guide to Performance Management • Guide for Managers • Manager Insights Hub (must be a manager to access)
Managers Toolkit	• Performance Management • Introductory Review Period for New Hires • 90-Day Evaluation for Internal Transfers • Annual Performance Appraisal Program • Competencies • Effective Performance Management	**Tip Sheets**	• Performance Management for Managers and Employees • Goals and Check-Ins • Performance Review for HR Partners
Live Training	**Conducting Performance Appraisals for Supervisors** • April 8, 12:30 to 1:30 p.m. • May 6, 12:30 to 1:30 p.m. **Participating in Performance Appraisals for Staff** • April 9, 12:30 to 1:30 p.m. • May 7, 12:30 to 1:30 p.m.	**Short Videos**	Goals in Workday: Shows how to add or update goals in Workday, and how managers can add or update goals for their direct reports. Included is information about goals, two short demonstrations, and resources for support. Performance Reviews: Shows how an employee and a manager step through the performance review process in Workday.

Use Your Manager Insights Hub

- Find the **Manager Insights Hub** in your Workday global navigation menu (if you do not have the Workday role of manager, you will not see the hub, or you will encounter an error if you follow the link).
- Navigate to Talent/Performance
- Keep up with your staff direct reports' goal management and performance reviews



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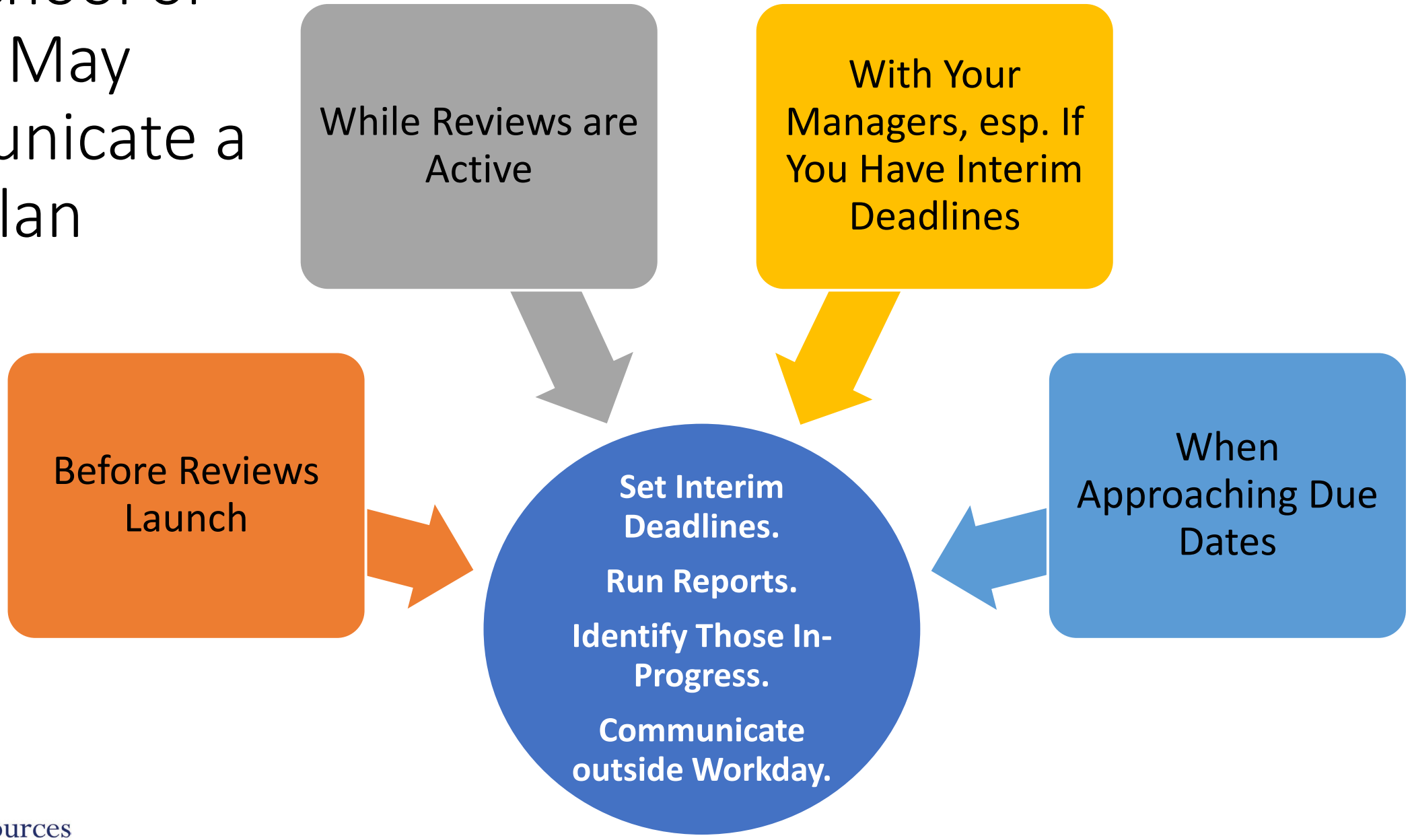
Which Goals Are Included in the Review?

Automatically Included	Can Be Manually Included During the Review	Cannot Be Automatically or Manually Included
• **Approved by the manager, including staff updates submitted to the manager prior to the review** • Due date within the performance review period • Marked with status “not started,” “in-progress,” or “completed.”	• **Approved by the manager, including staff updates submitted to the manager prior to the review** • Due date in a future review period • Marked with status “not started,” “in-progress,” or “completed.”	• **Not approved by the manager, including staff updates submitted to the manager prior to the review** • Due date in a previous review period and reviewed in a prior review. The goal was then updated multiple times with multiple statuses and due dates, without manager approval • **Review launches with lingering, unapproved updates**
• **Approved by the manager, including staff updates submitted to the manager prior to the review** • Due date within the performance review period • Marked with status “blank.” These are typically cascaded from the manager, department, or school/ center.	• **Not approved by the manager, including staff updates submitted to the manager prior to the review** • Due date within the current performance review period or a future review period • Marked with status “not started,” “in-progress,” or “completed.”	
• **Approved by the manager, including staff updates submitted to the manager prior to the review** • Due date in a previous review period, and reviewed in a prior review, then updated with an approved current or future review period due date prior to the review launch • Marked with status “not started,” “in-progress,” or “completed.”	• New goal added by staff during the self-evaluation or by the manager in the manager evaluation • If added by staff and reviewed during the manager evaluation, the new goal is added to the staff’s goals • If added by staff, the goal can be removed by the manager during the manager evaluation	
• **Approved by the manager** • Due date in a previous review period, and reviewed in a prior review • Marked with status “not started” or “in-progress.”	• Marked with status “not applicable.” • Generally used for goals that cannot be met, measured, or are no longer relevant to the employee's current responsibilities during the evaluation	

Your School or Center May Communicate a Local Plan



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Central Communications

For Your Awareness

Timing	Communication
Months of March through May	Periodic articles in myHR newsletter
Week of March 17	Eblast from HR to all managers of eligible staff
Week of March 24	Eblast from HR to all eligible staff
April 1	Workday notification to eligible staff to begin self-evaluation
April - May	Periodic Workday notifications to staff/managers with in-progress reviews

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