

Performance Reviews – Team Member’s Guide

This document is designed to provide Team Members with the knowledge on appropriately preparing for and completing the performance review process at ESI. The review process is completed through ESI’s Human Resource Information System, UKG Workforce Ready.

The Performance Review in Three Stages



You will receive a notice when the process has been initiated. When the self-assessment is ready for your input, you will receive another notice. Please complete the self-assessment within 5 days.

TEAM MEMBER PREPARATION

The Performance Review contains a series of questions relating to the following ESI success criteria.

Review Categories

ESI Core Values	7 Habits of Highly Effective People	Client-Facing Competencies
Integrity	Be Proactive	Adaptable
Innovation	Begin With the End in Mind	Influencer
Collaboration	Put First Things First	Effective
Humility	Think Win-Win	Communicator
	Seek First to Understand, Then to Be Understood	Solutions-Oriented
	Synergize	Technically Skilled
	Sharpen the Saw	Quality/Quantity of Work

Read Appendix B to fully understand each of these review category descriptions.

Rating Scale

Score yourself on each of the above performance categories using the following scale:

- 5 – Role Model,
- 4 – Exceptional,
- 3 – Valued Contributor,
- 2 – Inconsistent,
- 1 – Not Effective

Read Appendix C to fully understand each of these review rating scale definitions so that you can honestly and accurately rate your own performance.

Supporting information

You should already have a good understanding of your personal performance objectives on the project(s) against which you will be assessed.

Some helpful questions to ask yourself:

- What are some specific examples of your achievements?
- What specific feedback do you have about your work from internal or external customers?
- Are you meeting performance objectives?
- If you are not meeting performance objectives, what are the contributing factors? To what extent are these factors within your control?
- Do you display exceptional behavior in the workplace?
- How have your skills, knowledge, and capabilities developed?
- What can you do to improve performance and/or behavior in the future?
- How have you positively impacted team culture?
- How have you supported and encouraged your peers to be successful?
- What is the impact of your performance on the team?
- What can you do to improve your performance and/or behavior in the future?
- What progress have you made in implementing prior year Performance Review process outcomes (if applicable)?

At the end of the preparation phase, you should be able to clearly articulate:

- What is working well
- Areas of achievement
- Areas for improvement/current gaps



SELF-ASSESSMENT

Team Members are responsible for completing their own self-assessment in UKG Ready. Upon completion and submission, an email notification will be sent to the Manager informing them that the self-assessment is finished and that the *Manager's review* is now ready for completion.

Accessing the Performance Review Process

Once you log into UKG Ready you will find outstanding items in your My To Do list, located in the bell icon or in My Mailbox widget on the home screen in UKG.

Step 1: To complete your self-assessment, go to the To Do item that states Review Performance Review and click on the blue **REVIEW** button at the bottom to start.

The screenshot shows the ESI My Mailbox interface. At the top, there are tabs for 'My To Do Items' (with 1 notification), 'My Notifications' (with 4 notifications), and 'My Checklists' (with 1 notification). Below these are buttons for 'Reject' and 'Approve'. The main area is titled 'My To Do Items' and shows a single row of items. The first item is a card for 'Review Performance Review' for 'Child Test'. The card includes a photo of Child Test, the title 'Review Performance Review', the name 'Child Test (9999)', and a creation date of 'Created 07/14/2023 09:46 am'. On the right side of the card, there are two buttons: 'View Performance Review' and 'View Workflow'. Below the card, there are several data tables with columns like 'ESI Manager', 'Big Kid Test', 'Back-Up Manager', and 'Rebecca Ferleman'. At the bottom of the card, there are fields for 'Created' (07/14/2023 09:46 am), 'Employee Name' (Child Test), 'Scheduled Date' (Jul 11, 2025), and 'Name'. The 'Review' button at the bottom right of the card is highlighted with a red box.

Step 2: Once inside the review, you will land on the Instructions tab. Please take a moment to read and understand them. To complete your self-assessment, click on the Entry tab.

Step 3: Within the Entry tab, select and enter ratings and comments. In the example below, you can see Team Member Child Test's ratings.

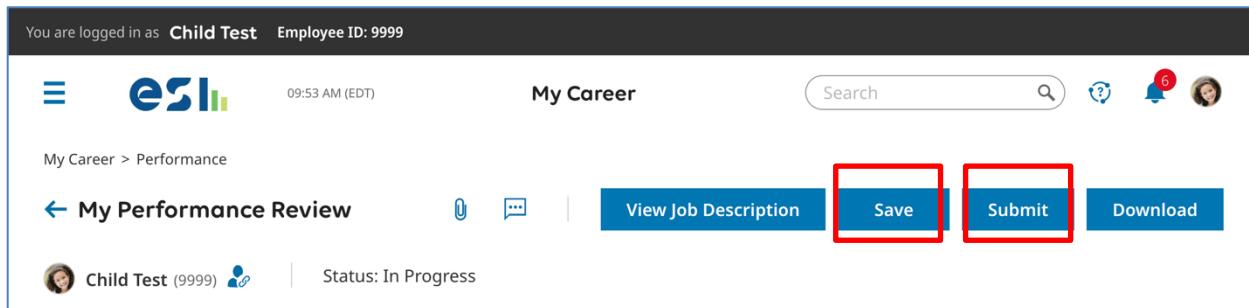
The screenshot shows the ESI My Career > Performance interface. At the top, it displays 'You are logged in as Child Test Employee ID: 9999'. The main title is 'My Career' with a sub-section 'My Career > Performance'. Below this, there is a navigation bar with buttons for 'View Job Description', 'Save', 'Submit', and 'Download'. The current tab is 'Entry'. The main content area is titled 'My Review' and shows a 'Rating' dropdown set to 'Valued Contributor'. Below the rating, there is a 'General comments' section with a rich text editor. The text entered in the comments field is: 'I believe I am consistent with the ESI team values. I know I still have much to learn, so I look for ways to build resiliency in light of feedback.'

As you work through the assessment, take your time, and honestly consider how you are doing. Read through each of the scale ratings (i.e., “valued contributor”) and pick which entry best reflects your overall performance for that category. At the end of each rating section, enter any General Comments that help explain or support your rating selection. Be aware that this is an opportunity to share *concrete explanations* of your specific ratings with your manager. Refer to Appendix B & C for detailed help.

Step 4: As you work on your self-assessment, you can click the blue **SAVE** button if you need to step away. You can come back into the review multiple times and edit or change your entries prior to submitting.

Note: Saving does not submit the self-assessment.

Step 5: Once you have *completed* your self-assessment, click the blue **SUBMIT** button. This will notify your manager that you have completed your review and that they can now schedule a meeting with you to discuss the reviews.



MEET WITH YOUR MANAGER

The Performance Review meeting is the most important step of the process as it allows a robust discussion between you and your manager about your performance over the past 12 months. It is an opportunity to celebrate your successes, discuss any obstacles you are facing, and put in place concrete goals to pursue over the next year.

Prior to this meeting, your manager will record their ratings and comments. During your meeting, you and your manager will be able to discuss your performance and ultimately come to a final agreement on what is an appropriate and helpful rating of your performance. In this way, the Performance Review is a collaborative process, with shared goals, measurable data, and a clear path forward for your continued success.

Finalizing

Step 1: Meet with your Manager. Be ready and eager to share substantive ways how you have succeeded in your role as a Team Member, and *equally* eager and ready to hear your manager’s perspective on your performance. In addition to recapping your performance over the past year, the review meeting is equally an opportunity to discuss *continued* performance going forward and

tangible ways that you can continue to grow and improve contributions to your project/team.

Step 2: After the meeting, the Manager will submit the review for approval by ESI's Sr. VP.

Step 3: Once reviewed and approved, you will then be notified within UKG to "sign" the review. Providing your UKG password will indicate the review has been "signed" by you, acknowledging that the review meeting was held, and the contents of the review were discussed. Once you sign the review, the review process is complete. Please be sure you **complete this step**, as UKG will continue to remind you and your manager if you do not sign.

AFTER THE REVIEW

Goals

The annual performance review cycle always provides an opportunity for growth. After the review process is completed, your manager may enter Goals for the new review cycle. You are able to enter personal goals if you desire.

Update Resume

Finally, you will also be assigned a checklist to update your resume inside of UKG. This allows you to document your successes and provides ESI with a current document to use in securing our contracts for work. *It is important that we have a current resume on file.* Please look at this as an important aspect of the entire process.

You are logged in as Child Test Employee ID: 9999

09:55 AM (EDT) My Mailbox Search

My To Do Items 1 My Notifications 4 My Checklists 1

← My Checklists Refresh

Page 1 of 1 1 - 1 of 1 Rows

Update Resume
Child Test
Created 07/12/2023 10:38 am
0% complete

Update Resume
Employees completing a performance evaluation must update their resume.

Child Test (9999)

Not Started (0 out of 1) 0%

Created 07/12/2023 10:38 am

Open Checklist

Congratulations on a successful year!