

Leader Performance Review Training

FY 2021 Performance

Learning Objectives

By the end of this training session, you will be able to:

- Learn what the FY21 performance review process looks like
- Follow the streamlined Kronos Workforce Ready process to complete performance reviews
- Effectively prepare for your performance reviews
- Deliver effective performance reviews

What Does the FY21 Process Look Like?

- Performance reviews are not required for PRN or Seasonal staff, or anyone hired April 1, 2021 or later. You are still encouraged to share feedback with them about their performance, and document that conversation in Kronos.
- Self-evaluations are required for leaders only, not team members. They will still be available for team members as an OPTION.

What Does the FY21 Process Look Like?

- Leaders are required to rate each of The 6Cs (Sun Health Behaviors) and JSAs (Job Skills & Abilities) for their direct reports.
- Comments next to each of the 6Cs and JSAs are **OPTIONAL** – only overall comments for these two sections and the final comments section are required.
 - NOTE: If you include comments in the 6Cs and JSAs that are adequate, you can simply type “See above” in the overall comments fields.
 - Always use the 6Cs and JSAs to document when improvement is needed **None of the Time** or **Some of the Time**, and when you’re giving a rating of **All of the Time**. You shouldn’t need to add a lot or any comments for ratings of **Most of the Time**.

What Does the FY21 Process Look Like?

- When you submit completed performance reviews, they will be sent to HR for review. HR will either FINALIZE the review or REJECT it if changes need to be made.
- Once finalized, HR will send you a PDF version of the review so that you can deliver it to your team member.
- Scan and email the review after it is signed and dated by you and each of your team members. HR will upload the review in Kronos.

Sun Health Behaviors (The 6Cs) and Job Skills & Abilities (JSAs)

- Sun Health Behaviors (The 6Cs)
- Leader Job Skills & Abilities
- Employee Job Skills & Abilities

Sun Health Behaviors (The 6Cs)

Sun Health Behaviors (The 6 Cs)

Customer Focus (Internal & External)

Communication

Collaboration & Teamwork

Creativity & Innovation

Credibility

Commitment to Compliance



Employee Job Skills & Abilities

Employee Job Skills & Abilities

- Quality of Work
- Effective Use of Time
- Job Knowledge and Technical Skills
- Safe Work Habits
- Dependability
- Adaptability



Leader Job Skills & Abilities

Leader Job Skills & Abilities

- Ensuring Employee Accountability
- Fostering Connection and Belonging
- Influencing and Leading Change
- Making Effective Decisions
- Managing Employee Performance and Development
- Demonstrating Emotional Skills/Intelligence (EI)



Performance Review

Performance Review Process and Meeting

Performance Review Process

The Performance Review phase occurs **July** through **September**.

Process

- Employees can expect to receive honest feedback from their leader on goal achievement and behaviors.

Notes:

- This conversation will focus on performance since the employee's last review and will include feedback on the Employee/Leader Job Skills & Abilities and Sun Health Behaviors (The 6Cs).
- Participation in the LEAD programs will be shared next week – results to be documented in leader performance reviews in the General Comments section.

Performance Review Tools

<https://employees.sunhealth.org/trainingin-service/>

1. [The 6Cs](#)
2. [Employee JSAs](#)
3. [Leader JSAs](#)
4. [Performance Review Dos and Don'ts](#)
5. [Performance Review Coaching Questions](#)

[RESOURCE: Vibrant Living Culture Overview C. 4.29.21](#)

Preparing for the Performance Review

Before the Meeting

- Schedule meeting in advance in a private place (45 minutes to an hour)
- Gather documentation for a robust review
- Have team member complete self-evaluation by July 31 so you can finish your review by September – exempt leader only required
- Before completing the review, list:
 - the main areas of responsibility
 - what the employee has done well
 - what the employee needs to improve
 - what you can do to help the employee do a better job

Preparing for the Performance Review

During the Meeting

- Have questions prepared for a two-way conversation using the [Performance Review Coaching Questions](#)
- Focus on strengths more than opportunities
- Develop a plan for a broader career discussion
- Celebrate successes and be inspirational about the next year

Employee Calibration Sessions

- Leaders within a department get together to review team member ratings
- Leaders discuss and make changes to ratings and/or feedback before review meetings begin
- Helps ensure more fair and accurate ratings & feedback for team members

Overall Performance Ratings “Math”

These are final calculated scores that will determine the final performance rating.

| Overall Performance Score Ranges | |
|----------------------------------|---------------|
| Exceeds Expectations | 3.0-2.6 (15%) |
| Meets Expectations | 2.5-1.9 (70%) |
| Improvement Needed | 1.8-0 (15%) |

Merit Increases

- Non-exempt (hourly) team members not eligible for VPP or another bonus program:
 - On the July 30 paychecks, permanent pay increases will be in place for many front-line positions
 - All team members benefitting from the increase will receive a personal communication in the coming days
 - All team members not getting this increase will receive a pay increase effective January 1, 2022.
- Team members/leaders eligible for VPP or another bonus program are eligible for merit:
 - Effective October 2021



To: All Sun Health Team Members
From: Joe La Rue, President, Sun Health
CC: Executive Leadership Team
Date: July 15, 2021
RE: Compensation and Vibrant Pay

On behalf of the entire Sun Health leadership team, I want to thank you for your service to our residents, members, donors, clients and community over the last 16 months. Before, during, and even now as the pandemic stretches on, Sun Health team members remain our greatest strength and make it possible to achieve our core purpose: Empowering people to enjoy living longer.

We are aware the importance of our team members to the overall success of the organization and in 2020, we began compensation efforts to reward team members for coming to work every day facing the challenges that the pandemic threw at us. We first launched Vibrant Pay, which has been our largest program that at its peak provided an additional dollar an hour for every hour worked. Since inception, Sun Health has paid **\$857,000** in Vibrant Pay to our team members. In addition to Vibrant Pay, we offered COVID non-work pay, shift pick up bonuses, and began shift differentials. These programs were not budgeted, yet very important to support our team members during a challenging time. We must thank our governing boards for their support and approval of these compensation programs. Without their support, none of these programs could have been implemented.

We are now shifting focus to a longer-term approach to the ongoing pandemic and realize we must change our current programs to meet the shifting needs of our workforce. *As a result, we are ending Vibrant Pay effective with the July 16, 2021 payroll, and later this month providing permanent pay increases for many front line positions.* Vibrant Pay was intended as a temporary program, and we are grateful to have offered it to you, our valued team members, for as long as we have.

All team members benefiting from the new permanent pay increase will receive personal communication next week, and will see those increases on the July 30, 2021 paychecks. Sun Health leadership is doing everything it can to address our staffing challenges and will continue to look for ways to make Sun Health YOUR employer of choice.

All other team members will be eligible for their merit pay increases based on their performance evaluation ratings – exempt staff in October and non-exempt (hourly) staff in January. We are pleased to tell you that we increased our budgeted merit increase to 3% for fiscal 2022, up from 2% for the last several years.

Sun Health has done an excellent job in proactively facing the challenge of COVID-19. I am proud of everyone at Sun Health who is part of our VIBRANT team. I know we can face the challenges ahead because of our strength and dedication in working together toward a common goal.

Thank you.

Performance Management Next Steps

Next Steps

- Your HR Team will send you back your completed MYCI forms for quick reference – **DONE**
- Encourage team members to complete and send you a self-evaluation using the online form found on the portal by 7/31
- Ensure leaders complete their self-evaluations in Kronos by 7/31
- Schedule performance reviews for July through early September
- Complete your part of team member performance reviews in Kronos
- Conduct team member performance reviews following guidelines
- Provide signed performance reviews to your HR team:
 - Leader Reviews – Due by September 3
 - Team Member Reviews – Due by September 17

Wendy.Pardonche

From: Wendy.Pardonche
Sent: Tuesday, July 13, 2021 10:30 AM
To: #All
Subject: It's Time for Annual Performance Reviews!
Attachments: Team-Member-Performance-Review-Self-Evaluation-Fillable.pdf

Importance: High

Dear Team Members,

Annual performance reviews are in process, and we encourage you to share feedback with your leader about your performance throughout the last year (July 1, 2020 – June 30, 2021)! This year, you can share your feedback using a simple and fast fillable form, found on the Sun Health portal (and also attached): [Performance Review Self-Evaluation Form](#).

Using this form, you can rate yourself on how you think you demonstrated each of our Sun Health Behaviors (The 6Cs) and Job Skills & Abilities. You can also provide comments about your performance – what you think you did well, any challenges you experienced, your greatest accomplishments over the last year, and other performance-related information you would like to share with your leader.

If you would like to provide this feedback on your performance, please complete the **Performance Review Self-Evaluation Form** and email or give to your leader by **July 31, 2021**. It is completely optional and highly encouraged for you do so.

Please Note: This Team Member Performance Review Self-Evaluation is for team members only – all leaders are expected to complete and submit a self-evaluation through UKG (Kronos).

***** LEADERS:** Please share this information with your team members. We will also provide a version of the Team Member Performance Review Self-Evaluation and this communication in Spanish this week. ***

Sun Health is committed to keeping our community safe and is here for you. [Learn more](#)

Wendy M. Pardonche
SVP of HR & Organizational Development
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