

Performance Management Process - Application Glossary

Approval Process is the method used by the manager and direct report to finalize the annual goals.

Competency Self-Assessment helps identify knowledge and behavioral competency strengths and development needs using the competency model. These ratings then can drive developmental goals to support growth in your profession.

Dashboard or more accurately labeled **business intelligence dashboard (BI dashboard)** is a data visualization tool that displays on a single screen the status of business analytics metrics, key performance indicators and important data points for an organization, department, team or process.

Developmental Goals are learning-oriented. They spell out the skills, knowledge and experiences the employee needs to either remain effective in his/her current job or support the employee's ability to take on new responsibilities and grow in his/her career.

*At Rutgers, the developmental goal is linked to a specific competency. **Developmental Goal Ratings** in the Rutgers Performance Management application are “Met,” “Not Met” and “Not Observed.”*

End-of-Year: is when the manager enters the Performance Management Application and rates the direct report's level of accomplishment and posts comments. Once completed, the direct report enters the goal plan, reviews and posts their comments. After meeting to discuss the evaluation and rating, edits can be made. The direct report submits the Final Goal plan to be approved and closed.

End-of-Year Attestation: Both the Manager and the direct report have an attestation that pops up to be completed as part of the completion process.

Goal Setting Period is the period of time when the Performance Management Application will be open for everyone to do a self-assessment and set development and performance goals for the year. Using the application Managers share overarching goals for the department to accomplish and team members post their goals for approval.

Mid-Year Re-calibration can happen during the **Mid-Year Review** when the Goal Plan is open. Goals can be added, adjusted and deleted. If there are any changes to the goals, the **Approval process** as used in the initial **Goal Setting Period** will be engaged.

Mid-Year Review is a specific period when the Performance Management Application will be open for a goal review. A **Mid-Year Attestation** is completed by the Direct Report to confirm a conversation about goal progress was discussed with the Manager.

Performance goals are short-term objectives set for specific duties or tasks in the current job position. These goals are usually related to the overall company goals or specific department goals. They help guide expected work output by the individual for the identified period.

At Rutgers, the performance goals have Performance Goals with Thresholds:

The Base Threshold: which would be the expected level of achievement or outcome for the goal.

The Median Threshold: would be a 10-15% stretch outcome.

The High Threshold: would be a 15-25% stretch goal.

Performance goal rating in the Rutgers Performance Management application are Met, Not Met and Not Observed.

Progress Notes and Comments Throughout the year both the manager and the direct report can insert progress notes and upload documents to the goal plan (e.g. certificate of completion). They both can also post information or comments to a specific goal and select to have the update emailed to the other.

SalesForce is the company providing the content management platform for the technical application used by Rutgers for Performance Management.