

# PERFORMANCE DEVELOPMENT PROGRAM GUIDE



UNIVERSITY OF  
**WATERLOO**

Human  
Resources

# PERFORMANCE DEVELOPMENT GUIDE

## Introduction

The University of Waterloo is transitioning from a traditional performance management model to a continuous performance development approach supported by Workday. Through structured goal setting, regular check-ins, and timely feedback, Workday enables performance development to remain an active and visible component of day-to-day work. The year-end conversation becomes a comprehensive summary of these interactions, resulting in a more balanced, forward-looking discussion.

This shift moves away from a single annual review toward ongoing, meaningful conversations that emphasize growth and development. Although the change may appear subtle, its impact is substantial: fostering a culture of continuous development, supporting employee well-being, and promoting a more human-centric approach to career development.

This Performance Development Guide explains the key program components and outlines the responsibilities of employees and managers.

## Program Components

Performance development is a proactive, collaborative process designed to build trust, enhance engagement, and support career growth. Grounded in goal setting, regular check-ins, and feedback, this approach replaces once-a-year evaluations with ongoing dialogue promoting a workplace where employees feel supported and empowered to do their best work.

### Goal Setting

#### Overview

Goal setting provides a structured way to align individual, team, departmental and institutional priorities so that everyone's work contributes meaningfully to the University's strategic direction.

**Institutional Goals:** Waterloo at 100 sets the long-term vision for the University. The outlined priorities guide planning across all faculties and departments, ensuring that strategic

direction is clear, known, and consistently advanced through coordinated planning and goal setting across the university.

**Department and Teams Goals:** Departments translate institutional priorities into actionable plans that reflect their unique responsibilities and objectives. These goals shape team-level expectations, helping departments and teams coordinate efforts and maintain alignment with the broader institutional vision.

**Individual Goals:** Individual objectives build from departmental and team priorities while incorporating each employee's role, responsibilities, and development needs. In Workday, employees can set goal types including Job-Related, Skills Development, and Growth Initiative goals, providing flexibility to support both performance and professional growth. Goals can be adjusted throughout the year as responsibilities or priorities evolve.

**How Workday Supports Alignment:** Workday enables employees and managers to create, track and refine goals over time, ensuring day-to-day work stays connected to department and institutional goals. This ongoing alignment strengthens performance development and supports meaningful progress at every level of the institution.

## Responsibilities

Employees and managers share the responsibility for ensuring goals are created, maintained, and aligned with institutional priorities.

Managers can cascade team or department goals to their direct reports.

## Requirements

- 1) Establishing Aligned Goals
  - Goals should support individual responsibilities while contributing to team, departmental, and institutional objectives.
  - Cascading goals must be considered to ensure alignment from institutional strategy (e.g., Waterloo at 100) through to individual performance expectations.
- 2) Using Workday to Document Goals
  - All goals must be entered into Workday using the appropriate goal type:
    - **Job Related Goals** – core responsibilities essential to the role performance and team outcomes.

- **Skill Development Goals** – knowledge, skills, or experiences that enhance effectiveness in the current role or support future career aspirations.
  - **Growth Initiative Goals** – contributions beyond standard role expectations, such as process improvements, new initiatives, or exploratory work.
- 3) Maintaining and Updating Goals
- Goals should be reviewed and updated throughout the performance cycle to reflect changing needs, progress, or shifting priorities.
  - Employees and managers are encouraged to revisit goals during regular check-ins to ensure ongoing clarity and relevance.

## Timelines

April 1 – June 30 annually

## Check-ins

### Overview

Check-ins in Workday are designed to support ongoing conversations between employees and managers by providing a centralized space for documenting key discussion points. While the use of check-ins is not mandatory, the feature serves as a valuable tool for capturing highlights from conversations, tracking progress on goals, and reinforcing a culture of continuous collaboration and growth. The functionality complements existing communication and meeting practices by offering a reliable place to record information that can be referenced throughout the performance cycle.

### Requirements

- 1) Purpose of Check-ins
  - Check-ins are intended for documentation, not scheduling.
  - They provide a consistent location to record discussion topics, feedback, follow-up actions, accomplishments, and progress related to goal setting.
  - This documentation helps to ensure important conversations are captured and can be revisited over time, supporting continuity and alignment.
- 2) Functionality and Use of Check-ins

- **Notifications:** Check-ins appear in the Workday Daily Digest to support awareness and timely review.
- **Calendar Integration:** Check-ins do not currently integrate with Outlook calendars. A separate Outlook meeting must be scheduled.
- **Shared Notes:** This section allows both participants to record notes, required actions, and next steps. All content entered in Shared Notes is visible to both the employee and manager.
- **My Notes:** This private section is visible only to the person entering the information. It is intended for personal reflections, reminders or details an employee or manager wishes to retain individually.

### 3) Importance of the Performance Development Approach

- Ongoing dialogue between managers and employees supports the University's values of thinking differently, acting with purpose and working together.
- Regular use of check-ins encourages proactive communication, early identification and resolution of issues, and strengthens working relationships.
- Consistent documentation supports professional growth, fosters mutual accountability, and reinforces alignment between individual efforts and institutional goals.

## Timelines

On-going, throughout the performance year (May 1 – April 30). At minimum conduct one mid-year check-in conversation (September 1 - November 30).

## Feedback

### Overview

Feedback is an important component of performance development. It involves sharing observations about an individual's performance, behaviour, or impact with the intention of reinforcing strengths or identifying opportunities for improvement. When delivered thoughtfully, feedback promotes growth, enhances self-awareness, and supports the development of a learning-oriented culture.

The University is committed to building a rich feedback environment in which feedback is offered and received with kindness, clarity, and purpose. Waterloo is taking a deliberate approach to make feedback easier, more meaningful, and more supportive across the institution.

Workday provides tools that help employees and managers participate in this culture by enabling individuals to request feedback, provide constructive feedback to others, and recognize accomplishments through badges aligned with our institutional values.

## Requirements

### 1) Using Workday to Support Feedback Practices

- **Request Feedback:**

- Employees can request feedback on self to gain insights into strengths, development areas, and overall effectiveness.
- Managers can request feedback on their direct reports from co-workers, project partners and others who can provide meaningful insights into their performance and contributions.

- **Provide Feedback:**

- Individuals can offer feedback that is constructive, respectful, and consistent with the University's expectations for professionalism and collaboration.

- **Recognize Accomplishments:**

- Workday's badge system allows individuals to celebrate contributions and express appreciation in a visible and meaningful way.

### 2) Selecting a Badge that Reflects Institutional Values

When giving feedback, users may select a badge that aligns with the nature of the contribution. The badges reinforce the University's values and highlight the behaviours that strengthen our culture:

- **Think Differently:** Recognizes unconventional, bold and innovative thinking and the willingness to question assumptions or try new approaches.
- **Act with Purpose:** Highlights responsibility and action orientation that create positive impact within the Waterloo community or beyond.
- **Work Together:** Celebrates collaboration, shared problem-solving, and contributions that enhance teamwork and collective success.

### 3) Supporting a Culture of Growth

Regular engagement in the feedback process helps strengthen relationships, support individual and team development, and create a workplace that prioritizes connection,

collaboration, and continuous improvement. These practices contribute to a culture where employees feel supported, recognized, and empowered to grow.

## **Timelines**

On-going throughout the year.

## **The Year End Conversation**

### **Overview**

The year-end conversation is a key component of our approach to performance development. It provides an opportunity for employees and managers to reflect on achievements, challenges, and growth throughout the year, while setting shared expectations for the year ahead. This conversation builds on regular discussions, ongoing feedback, and documented progress maintained throughout the performance cycle.

Workday supports this process by providing a structured workflow for capturing self-evaluations, documenting managerial feedback, and finalizing the performance summary. The year-end conversation serves as a culmination of these interactions, resulting in an objective, forward looking discussion grounded in shared understanding and institutional values.

### **Requirements**

#### **1. Employee Self-Evaluation**

Upon receiving the Workday notification, the employee is responsible for completing the self-evaluation section. This includes reviewing all documented goals, integrating relevant feedback received throughout the year, and providing a clear summary of accomplishments. Employees may preview the evaluation questions using the provided fillable PDF (insert link). Once complete, the self-evaluation must be submitted in Workday for managerial review.

#### **2. Manager Review and Commentary**

The manager shall review the employee's self-evaluation and enter corresponding comments, observations, and performance insights into Workday. This step ensures the evaluation reflects both employee and manager perspectives.

Once submitted, manager comments can be viewed by the employee under the Talent worklet, My Reviews.

### **3. The Conversation**

The manager and employee must meet to discuss the evaluation content. This conversation is intended to support a comprehensive review of the employee's performance development and to establish alignment on strengths, growth opportunities, and future goals. Outcomes include identifying goals to carry forward and agreeing on new goals for the upcoming performance cycle.

### **4. Finalization of Evaluation**

Following the conversation, the manager completes the final evaluation in Workday and assigns the appropriate performance status. The two choices available are "*Needs Improvement*" and "*Meets Expectations*". Once submitted, Workday automatically sends the finalized evaluation back to the employee for acknowledgement.

### **5. Employee Acknowledgement**

The employee must review the finalized evaluation and formally acknowledge it in Workday. They may also add any concluding comments. The evaluation process is complete once the acknowledgement has been submitted.

### **Timelines**

February 1 – March 31 annually.

## **Summary**

Performance development at the University of Waterloo is grounded in regular, purposeful conversations between employees and their managers. These discussions support continuous growth, reinforce shared accountability, and contribute to a productive and engaged work environment. The approach emphasizes ongoing check-ins that recognize achievements, monitor progress, and provide timely, constructive feedback. Performance development reflects a collective commitment to upholding our values, foster continuous learning, and supporting one another in ways that strengthen individual and institutional success.