

**Date:** June 10, 2016

**To:** HR Directors and Designees

SEMA4 HR Users

**From:** Edwin Hudson, Deputy Commissioner



**Subject:** Agency performance review data due July 29

This memo is to notify you that agencies must record all performance review data in SEMA4 and submit the attached performance review survey to MMB by July 29, 2016. In early August, MMB will run reports from SEMA4 on agency Fiscal Year 2016 annual performance review completions, and provide a report to Governor Dayton.

To assist in the effort we are rolling out new tools, training, and reports. They include:

- Simplified and easier to understand data entry instructions (attached). These instructions will be added to SEMA4 Help soon.
- Training on the procedure at the June 9 SEMA4 Transactions User Group meeting (complete).
- New OBIEE reports that help agencies assess and improve the accuracy of their data.
- A trial period between June 10 and July 29 where agency staff can apply the updated procedure, use the reports, and identify and correct issues.

Please note that the attached procedure is streamlined, and the data you enter is compatible with the OBIEE reports whether you follow the instructions originally communicated in 2013 or the updated version.

Agencies interested in previewing the data from SEMA4 that MMB will use in this year's report to the Governor may run the OBIEE reports.

**What do I need to do by July 29?**

1. Encourage managers to complete all performance reviews due in Fiscal Year 2016.
2. Record all annual performance review data in SEMA4 using the updated SEMA4 data entry instructions.
3. Request a "General Data Correct" SEMA4 security role for agency HR staff who need to correct Employee Review data components.
4. Use the *Deleting Employee Review Information* instructions to delete the row of any employee who has within the fiscal year separated or retired from agency service prior to their performance review.

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5. Determine if there is a reasonable period of time to complete a review for employees returning from a leave of absence. When needed modify the Effective Date on the place holder row (and Next Review Date on the previous row) to extend the review due date.
6. Use the new Annual Employee Review Due and Done and Due and Not Done reports to audit employee review data. The reports are located in the [SWIFT Data Warehouse](#).
7. Fill out the attached Fiscal Year 2016 Survey on Agency Performance Review Practices. Email your completed survey to Gary Simon at [gary.simon@state.mn.us](mailto:gary.simon@state.mn.us).

#### **Notes about the survey**

1. *Definitions*: Definitions of the data requested in the survey are on page 3 of this memo.
2. *Survey Responses*: In all cases where the survey asks for a number as a response, please use a numeric value. Do not use a general descriptor like “all,” “some,” or “none.”

#### **Contact**

For questions about logging in or accessing the OBIEE reports, please contact the SWIFT Help Desk at 651-201-8100, option 2 or [swifthelpdesk.mmb@state.mn.us](mailto:swifthelpdesk.mmb@state.mn.us)

Please contact your SEMA4 HR Services Specialist if you have any questions about the survey.

- Judi Kaper at 651-259-3649 or [Judi.Kaper@state.mn.us](mailto:Judi.Kaper@state.mn.us)
- Mary O’Connor at 651-259-3633 or [Mary.OConnor@state.mn.us](mailto:Mary.OConnor@state.mn.us)
- Bill Ziegler at 651-259-3761 or [William.K.Ziegler@state.mn.us](mailto:William.K.Ziegler@state.mn.us)

Thank you for your support of this important initiative.

Attachments

## Survey Definitions

**“All Employee Performance Reviews”** includes all annual performance reviews whether related to a salary increase or not, and probationary reviews and other performance-related reviews. As far as SEMA4 coding is concerned, it includes the following review types: “Annual Performance,” “Both,” “Performance,” “Performance/Salary,” “Salary,” “Completion of Probation,” “Other Probationary,” and “other Performance”. It does not include review types listed in SEMA4 used by the courts.

**“Annual Employee Performance Review”** includes all annual performance reviews whether related to a salary increase or not. As far as SEMA4 coding is concerned, it includes the following review types: “Annual Performance,” “Both,” “Performance,” “Performance/Salary,” and “Salary”. It does not include review types related to probation, review types used by the courts or other non-annual reviews.

**“Competency”** is an attribute, knowledge, skill, ability, or other characteristic that contributes to successful job performance.

- **“Behavioral competencies”** describe what is required to be successful in an organization outside of a specific job. As such, behavioral competencies are specific to a person rather than to a job. Examples include communication, conflict management, creativity, innovation, etc.
- **“Job competencies”** are defined as the skills necessary to perform a specific job. Examples include analysis, contract negotiation, etc.

**“Performance Goal”** means a target level of performance expressed as a measurable objective against which actual achievement is compared.

**“Performance-based Increase”** refers to both step progression and performance-based salary increases. It does not include others, such as promotional increases, lane changes (SRSEA), achievement awards, etc.

**“Delayed or Withheld Performance Increase”** Per the collective bargaining contracts, appointing authorities may withhold step increases because of unsatisfactory performance with written notice. Increases so withheld may subsequently be granted upon certification of achieving satisfactory performance (i.e. delayed step increase). Per the plans, appointing authorities may withhold part or all of any increase because of performance.

**“Current Position Description”** means “reviewed annually AND rewritten in the last 3 years.”

**“Performance Indicators”** mean the statements or conditions that measure the quality or quantity of work to be performed, the time frame in which the work is to be completed, and/or the resources to be used to complete the job.

**“Performance Review”** means a periodic written assessment of an employee’s performance and discussion of that assessment with the employee. A formal performance rating is assigned during the review, and a copy is sent for inclusion in the employee’s personnel file.

**“Position Description”** means a formal definition of the duties, responsibilities, working relationships and performance expectations of a position in state service. Position Descriptions are to be written in the format indicated by the instructions accompanying the Position Description Form.