ORACLE PERFORMANCE

Oracle Performance: Goals Creation, Sharing, Approval

Training Agenda

- Key Takeaways from Overview Session

- Implementation Timelines

- Just-in-Time Training

- Goal Creation/Guidelines

- Goal Sharing

- Goal Plan Approval

- Career Statement Created

- Career Goal Added

- Demonstration/Practice

- Action Items

This training will be recorded for future use.

Key Takeaways from Overview Session
Management and Executive Pay Plan Positions

- Performance evaluations will be online.
- Employees and managers may view performance details, goal-related tasks, and rating information.
- Employees may privately provide performance feedback and publicly praise or acknowledge others.
- Facilitated check-ins and 1:1 conversations may be captured in the system for reference throughout the evaluation cycle.
- New competencies provide a pathway for internal career growth.
- Rating scale has been streamlined.
- Strategic business plan goals can be cascaded and aligned throughout the organization.

- Performance, Inclusion and Diversity, and career development goals will be established.
- Mid-year reviews will be implemented.
- Employees will have the opportunity to self-evaluate performance and collect 360-degree feedback from others.
- One standardized General Pay Plan performance evaluation will be used.
- Pay and performance has been decoupled.
- Step progression pay adjustments are being system-generated for employees in active status, unless 30-days advance notification is received regarding a performance concern.
- This does not affect the timing of merit adjustments as pay review dates will be frozen.
- A new step placement procedure has been issued.

Timeline for Management/Executive Pay Plan Positions

July 1—August 31, 2023: Complete and close out current performance evaluations for cut-over to new performance cycle using existing forms and the new Document of Records submission process.

July 1—August 31, 2023: Enter goal plans in Oracle Performance for the **new July 1, 2023-June 30, 2024, evaluation cycle.**

July 1, 2023—May 1, 2024: Employee and Manager have goal conversations/periodic check-ins.
Quarterly check-ins are encouraged but not required.

December 1-31, 2023: Employee and Manager complete mid-year reviews.
Mid-year reviews are required.

May 1-30, 2024: Employee completes self-evaluation of competencies and performance; Manager writes performance evaluation.
Employee self-evaluation is encouraged but not required.

Manager finalizes evaluation and submits for next-level approval.

Next-level approval obtained.

May 30—June 15, 2024: Calibration process completed.

June 15-July 1, 2024: Share performance documents.

July 15, 2024: Provide final feedback.

Timeline for General Pay Plan Positions (Pending Revision)

- **August 2023:** Distribute new performance evaluation template (pending finalization of revised timeline).

- **September 2023:** Offer informational sessions to discuss transition. Dates for scheduled sessions are available at: okc.gov/employees.

  Complete current evaluations when due using existing forms and the new Document of Records submission process. Introduce the new evaluation competencies and goals using the new form.

- **Date TBD:** Enter goals into Oracle Performance.

- **Date TBD:** Transition to online completion of performance evaluations.

UNDER CONSTRUCTION

Just-in-Time Training

Oracle Performance Training Schedule

Introduction: Oracle Learn and Oracle Performance		
Overview: Oracle Learning and Oracle Performance	August 14, 2023	9:00 a.m. to 10:00 a.m.
Overview: Oracle Learning and Oracle Performance (Last Call)	August 22, 2023	4:00 p.m. to 5:00 p.m.
Goal Creation: Performance, Inclusion and Diversity, Career Development *(Goals Applicable for Evaluation Period of July 1, 2023 – June 30, 2024)*		
Open Lab: Oracle Performance -- Creation of Goals	August 17, 2023	11:00 a.m. to Noon
Check-Ins / Feedback *(Check-Ins / Feedback Throughout Duration of Performance Review Period)*		
New Sessions To be Added		
Completion of Mid-Year Reviews *(December 1-31, 2023)*		
Open Lab: Oracle Performance – Mid-Year Reviews	October 24, 2023	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Mid-Year Reviews	October 30, 2023	9:00 a.m. to 10:00 a.m.
Open Lab: Oracle Performance – Mid-Year Reviews	November 8, 2023	10:00 a.m. to 11:00 a.m.
Open Lab: Oracle Performance – Mid-Year Reviews	November 29, 2023	3:00 p.m. to 4:00 p.m.
Employee Self-Evaluation *(May 1-15, 2024)*		
Open Lab: Oracle Performance – Employee Self-Evaluation	April 3, 2024	10:00 a.m. to 11:00 a.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 5, 2024	1:00 p.m. to 2:00 p.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 11, 2024	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Employee Self-Evaluation	April 15, 2024	9:00 a.m. to 10:00 a.m.
Manager Evaluation *(May 1-15, 2024)*		
Open Lab: Oracle Performance – Manager Evaluation	April 22, 2024	11:00 a.m. to Noon
Open Lab: Oracle Performance – Manager Evaluation	April 25, 2024	1:00 p.m. to 2:00 p.m.
Open Lab: Oracle Performance – Manager Evaluation	April 29, 2024	3:00 p.m. to 4:00 p.m.
Open Lab: Oracle Performance – Manager Evaluation	May 1, 2024	10:00 a.m. to 11:00 a.m.
Information Sessions for General Pay Plan Positions Transition to Oracle Performance		
Overview: General Pay Plan Positions Moving to Performance Evaluations in Oracle	September 13, 2023	9:00 a.m. to 10:00 a.m.
Overview: General Pay Plan Positions Moving to Performance Evaluations in Oracle	September 15, 2023	1:00 p.m. to 2:00 p.m.
Overview: General Pay Plan Positions Moving to Performance Evaluations in Oracle	September 20, 2023	3:00 p.m. to 4:00 p.m.
Overview: General Pay Plan Positions Moving to Performance Evaluations in Oracle	September 27, 2023	4:00 p.m. to 5:00 p.m.

Access the City's training calendar to enroll: intranet/TrainingSystems/Default.aspx

Schedule Revised 08/13/23

- Overview information sessions
- Just-in-time trainings including open labs with demonstrations (recorded)
- Job aides
- Course offerings on *Writing Effective Performance Reviews* and *Giving Effective Performance Feedback*
- Repeat each year for new people leaders

Information is available on okc.gov/employees

Goal Creation Guidelines—Use SMART Goals

- **Specific:** Increase the chances that you're able to accomplish your business goals by making sure they're well-defined. Determine the who, what, where, when and why.
- **Measurable:** Develop criteria for measuring progress toward your business goals. Detail the key indicators that help you decide if and when you reach your goal by quantifying them.
- **Achievable:** Create goals for your business that are attainable and achievable by ensuring that you and your team have the skills and resources needed to reach the goal.
- **Relevant:** Align your company's goals with the overall objectives of your business and the realities of the market.
- **Time-based:** Give yourself and your staff a deadline for reaching your goal to provide a sense of urgency and the opportunity to schedule the steps needed to achieve the goal.

Example SMART Goal

Career and Performance

- Click on **Company Single Sign-On**.
- Click on **Me**.
- Click on **Career and Performance**.

Goal Creation

- Select **Goals**.
- Select **+Add.**
- Select a **Review Period** from the drop-down list. The review period will be 07/01/23 – 06/30/24.
- Enter appropriate values in mandatory and relevant fields on the **Add Goal** screen.
- Select **Save and Close**.
- You can use the goal library to define goals consistently and reduce the effort of creating a new goal if similar goals already exist.
- The Performance Goal added will be displayed.

Goal Sharing

- Navigate to **Me/Career and Performance/Goals.**

- **Checkmark the Goal** to Share.

- Click on **Actions,** then **Share**.

- Click into the **Select a Value** box. **Search** and **Select** the **Employee** You Want to Share the Goal With.

- Click **Save and Close**.

- Click **Submit**. Then Click **Submit** again.

Goal Plan Approval

- Notification is sent to **Next Level Manager**.

- Next Level Manager **logs in** and clicks on the **Bell Icon** at the top right of the screen.

- **Views the approval notification.**

- Clicks on **Approve**.

Job Aide

Career Statement Created

- Navigate to **Me/Career and Performance.**

- Click **Down Arrow** Across from Career Statement.

- Click **+Add**.

- Enter a **Career Statement**.

- Click **Save**.
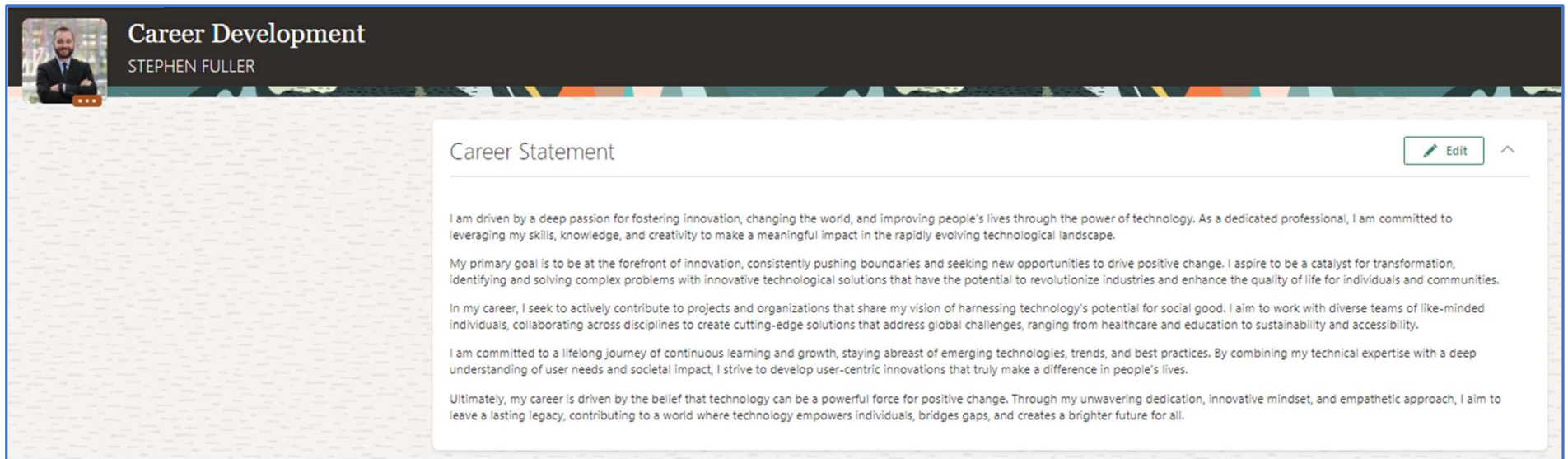
Career Goal Added

- Click **+Add** button to the far right of the Development Plan.

- Enter **Goal Details**.

- Click **Save and Close**.

- Repeat as Needed for Additional Goals.

- Click **Save and Close**.

Job Aide

Career Statement

A career statement enables employees to express their career aspirations for the near term and/or the long term in their own words. Employees can also state their career preferences such as when they are interested in making their next career move, what job or job area they would prefer and why. This information is useful for managers and leadership to understand their employees' desires and motivations.

Career Preferences


Career Preferences are a place where you can enter information about your next career move. It can be used as a resource to help you as you grow your career or refine the one you are in.

Action Items

- Attend an Overview session to get details about the new process. Last Call session scheduled for August 22, 4:00 p.m.
- **By August 31, 2023,** complete all performance evaluations (Executive/Management) and enter goal plans in Oracle Performance for goals that would be effective between July 1, 2023, through June 30, 2024.
- Ensure "**reports to**" information is accurate in Oracle prior to December 1 (mid-year reviews) and May 1 (evaluation).
- Direct questions to HRAssist@okc.gov.
- More information can be found on okc.gov/employees.
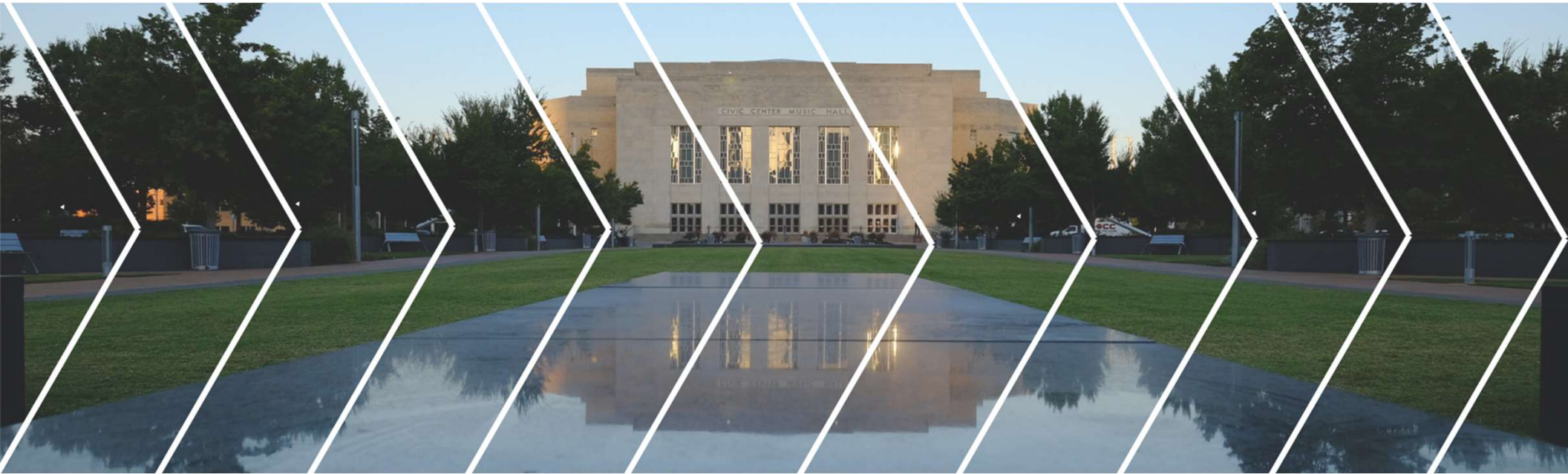
Questions?
Demonstration/Practice

Send questions to:
ONEOKCCLOUD@OKC.GOV