Talent Management User Guide for Employees

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Overview

The new Talent Management tool, found within the PeopleFirst Portal, is NFP's newest solution for managing and providing more frequent performance feedback to employees from their managers. By using this **Talent Management User Guide** you, as an employee, will be able to:

- Describe NFP's approach to performance management and how it relates to the **NFP Way** of: *Nimble*, *Fantastic Results*, and *Personal*
- Describe Check-ins and how they promote frequent feedback & fit into the system
- Create goals, enabling more frequent feedback with your manager through the Talent Management module
- Update your goals and goal progression throughout the year using the **Journal Entry** feature

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Our Approach to Performance Management

Understanding your contributions and receiving feedback about your performance is extremely important in terms of your past and current performance, your career aspirations, and overall happiness while at work. Unfortunately, many performance management systems and processes reflect antiquated approaches that are not effective in today's business environment. Today, individuals want more frequent feedback without the burdensome systems and process that are disliked by employees and managers alike. With the addition of **Talent Management** capabilities within the **PeopleFirst Portal**, we are able to provide a consistent experience across the company. This tool allows us to begin telling the story of how we perform here at NFP.

What does this mean for me? Research and internal feedback has allowed us to address common concerns found in traditional performance management systems and processes. While some offices may customize the process to fit business needs, the main components of our program are:

- More frequent feedback – called "**Check-ins**" (3 times a year, your regular 1:1 meeting with your manager becomes a check-in meeting).
- Goal setting is strongly encouraged. Talk with your manager or local HR representative to find out if you are required to create goals.
- No self-review component for your annual review (called the "**Performance Summary**").
- Your manager ties your performance contributions to the **NFP Way** – *Nimble*, *Fantastic Results*, and *Personal* as part of the Performance Summary

What's in it for me? PeopleFirst Portal allows us to use a common system and delivery approach, which means a consistent experience for all. So how does this help you?

- Save time & energy
    - o We've removed the manual/paper based approach that you may have experienced in the past.
    - o No time consuming self-reviews during the annual review period; simply create "**Journal Entries**" throughout the year to document progress in real-time.

- Receive more frequent feedback from your manager
    - o Three "**Check-Ins**" per year in held during your normal one-on-one meetings with your manager.

        Check-in #1: Document goals

        Check-in #2: Progress on goals and career aspirations (see Head Start, below)

        Check-in #3: Performance Summary; annual review to reflect on prior year performance

Get a **"Head Start!"** in your career: The new **Head Start** program will give you the opportunity to get a first look at upcoming open positions. Jobs are posted internally for at least a week before being displayed on the external careers page. To access the job descriptions:

1. Navigate to the **Career Opportunities** section on the right side of the **PeopleFirst Portal** home page

2. Click on the green **Head Start** link in the text

3. Click on the link to the **Montage** video. This will take you to the Montage virtual interview tool, where you will be asked for a short video introduction and to explain your interest in the position. Your resume will then be submitted to the hiring manager!

Please note: While you are able to initiate your application without prior approval from your manager, you will be required to get approval from your supervisor before you move any further in the process.

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Logging On

When you log in for the first time, there are a few additional steps you must take.

1. Navigate to: **PeopleFirst Portal** (http://www.nfp.com/peoplefirst).
   - Because you'll visit this portal often, you may wish to bookmark this link for future use.

2. Enter your **Username** and **Password**
   - Default Username is the first initial of your legal first name + last name + birth year in YYYY format.
     - Example: John Smith born 1/1/1960 would be JSmith1960.
   - Default Password is your birth year YYYY format + your home zip code.
     - Example: John's zip code is 19014 so his password would be 196019014.
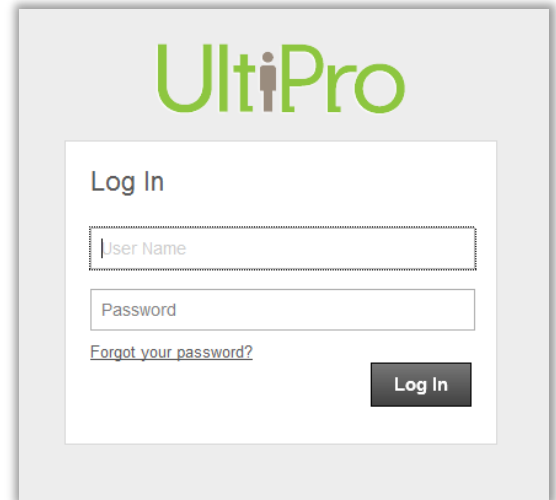
3. Change your **Password**
   - You will be prompted to change your password upon initial login.
     1. Password requirements are listed on the 'change password screen'.
     2. Must contain at least 2 letters.
     3. Must contain at least 1 uppercase letter.
     4. Must contain at least 1 lowercase letter.
     5. Must contain at least 1 number.
     6. Must contain at least 1 special character.

4. Create three **Challenge Questions**
   - You will be prompted to create challenge questions and answers.
   - You must create and answer all 3 questions.
     Note: The PF Portal won't allow you to use the same answers for all three of your challenge questions.
   - If you forget your password, you can click the Forgot Password link on the login screen to be prompted to answer your challenge questions.

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Navigating to Talent Management

After navigating to the **PeopleFirst Portal**, you'll be taken to the home page. From there, click on the **Menu** button at the top left, and under the **Myself** tab, select **Career & Education**.
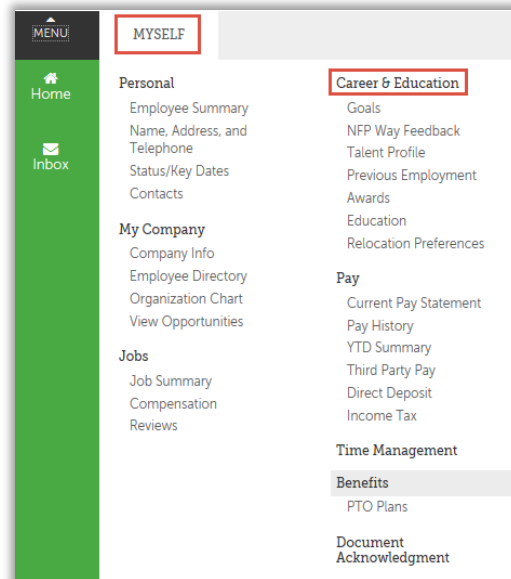
Career & Education Page

The **Career & Education** page will be your gateway to several important areas of managing your performance and are explained in further detail below:
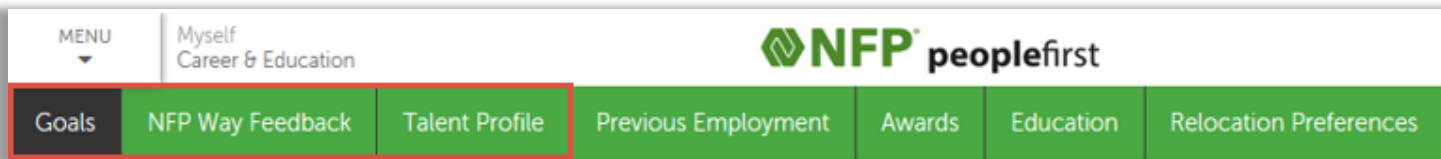
- **Goals**- this tab is the default page in **Career & Education**. This area allows you to create and edit goals, add notes or observations, called **Journal Entries**, and to progress your goals through to completion throughout the year.
- **NFP Way Feedback**- this tab will allow you to view the three categories of the **NFP Way** – *Nimble*, *Fantastic Results*, and *Personal* and enter **Journal Entries** to comment on your progress in these categories throughout the year. Note: Journal Entries made here can be made visible in the annual review, unlike Journal Entries made within a goal. Consider making Journal Entry notes in this section when you have occasion to document how you have embodied one of the three NFP Way tenets. For example, perhaps you were recognized for organizing a charitable event for your office. This would be a great example of being "Personal".
- **Talent Profile** – this tab allows you to create a different kind of journal entry, called an **Employee Observation**, which might not neatly fit within the **Goal** or **NFP Way Feedback** categories. Your manager can read these observations to get a clearer picture of your performance throughout the year.

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Goals

Creating goals allows you to identify important initiatives for execution along with highlighting areas in your job you'd like to focus on for further growth in your career. The Talent Management module will allow you to create your own goals, as well as write **Journal Entries** to mark your progress in these goals, throughout the year. Your manager has the ability to see your goals and create **Journal Entries** of their own as you work together to achieve them.

Check-in #1 – Document Goals: This check-in is designed to give you an opportunity to bring your drafted goals to discuss with your manager. The desired outcome of the check-in should be approved goals that you then enter into the system. Consider using the **SMART Goals worksheet** to draft your goals and bring a couple of copies to the check-in to review, edit, and confirm.

Not familiar or need a refresher with creating goals? Check out this brief module Writing SMART Goals to learn more.

Creating Goals

To create a goal, first click on the **Goals** tab on the **Career & Education** page.

1. Click the green **Add** button at the top right of the **Goals** page.
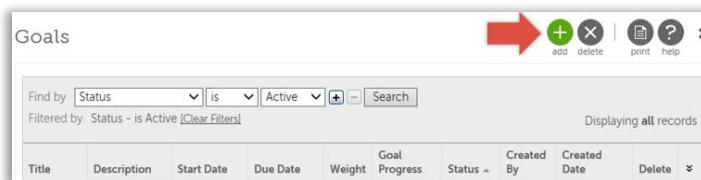
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2. This will take you to the **Add/Change Goals** page. Here you can enter the goal details and specify a start and end date.

- ▪ **Title**
- ▪ **Description**
- ▪ **Category**- choose between *Developmental*, *Performance*, or *Personal*.
- ▪ **Status**
- ▪ **Stretch Goal** – If your goal is not easily attainable and requires an extended period of time to achieve it (or if it aims for an outcome that may not be achievable), you can label it as a **Stretch Goal**.
- ▪ **Goal Dates**- Choose a **Start** and **Due** date for your goal

3. Once you've entered the details of your goal, click the green **Save** button at the top right of the page.
4. Your saved goal will appear on the **Goals** page.

Managing Your Goals

Check-in #2 – Progress on Goals & Career Aspirations: The purpose of this check-in is two-fold: 1) to give you and your manager an opportunity to discuss where you are at with your goals for the year, and 2) have an open and honest conversation about your career aspirations. The career aspiration conversation should be informal; however, you may want to take a look at the following articles to help you shape the discussion: **Preparing for a Career Aspiration Conversation**

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The following instructions will allow you to be prepared for the conversation about goal progress:
You can edit, delete, and update your **Goal Progress** on the **Goals** page.

1. **Editing**- You can edit goals by clicking on the link under the **Title** column. This will take you to the **Add/Change Goals** page where you can re-enter the information and save the goal.
2. **Goal Progress**- You can create **Journal Entries** by clicking on the completion percentage under the **Goal Progress** column. This will be covered in more detail in the **Creating Goal Journal Entries** section, below.
3. **Delete Goal**- Sometimes priorities change in the course of a year, which may require you to delete a goal you had created. If you wish to delete your goal, you can click on the check box under the
4. **Delete** column and then click the **Delete** button at the top right of the page. You may also delete a goal in this manner on the **Add/Change Goals** page, if you are in the process of editing.

> ⚠ **Please note:** Be sure to discuss removing your goal(s) with your manager prior to deleting.

Creating Goal Journal Entries

As the year progresses, you should have regular conversations with your manager. To be prepared for these conversations, you should use the **Journal Entry** feature. This feature allows you to enter comments about each goal as important milestones are reached through completion.

1. To create a goal **Journal Entry**, click on the completion percentage under the **Goal Progress** column.

2. This will take you to the **Goal Journal Entries** page.   The Goal Journal Entries page has the following fields:
   - **Comments**- enter your journal comments here. This can be anything from an observation about a success you've experienced to a personal note to check in on

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something later (see Visibility, below).

- **Goal Progress**- update your goal progress, as a percentage, as you work on it throughout the year. The number you enter here will show on the **Goals** home page.
- **Visibility**- You can elect to make your journal entries public or private.
    - o **Public**- If you choose to make your entry public, your manager will be able to read your **Journal Entry**. Choose this option if you are entering additional information you want them to consider during your review.
    - o **Private**- You can create a **Journal Entry** that is only viewable by you, the employee. This means that your manager will *not* see the note you've created. Choose this option to create a reminder of an action you need to follow up on later or to take note of potential obstacles you are facing.

> **!** System administrators can see all entries, and documentation is subject to subpoena as needed. Be conscientious and professional at all times.

- **Include in Review**- since **Goals** are not used by managers during the annual review ("**Performance Summary**"), you may skip this section.

3. When you've entered your journal entry, click **Post** to save it to the **Goal**.

4. This will return to the **Goal Journal Entries** page. All journal entries you've created for your goal will be displayed here. Your manager also has the ability to enter **Journal Entries**. You will see their comments here as well.

5. Click on the **Edit** or **Delete** links to remove or correct any entries you've entered on this page. You can only edit or delete your own entries, not your manager's or additional contributor's.

6. To return to the **Goals** home page at any time, click the **Return** button on the top right of the page.

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NFP Way Feedback

Check-in #3 – Performance Summary: This check-in acts as the annual performance review, and differs from traditional reviews in several ways:

- Your performance is tied to each tenet of the NFP Way (see below); weighted equally

- Your manager may consider goal execution in providing a rating for each tenet, but the system does not require it

- You are not required to complete a self-review

- Simplified, 3-star rating system

The NFP Way Feedback is where your performance contributions will be rated on an annual basis using the **NFP Way** – *Nimble*, *Fantastic Results*, and *Personal* as a guidepost to what NFP values as a company. Your manager will be rating your performance and how you embody each tenet in a given year:

Nimble- Bringing agility and innovative approaches to your work. To be nimble, an employee may:

- Listen well to understand what's important.
- Encourage creativity and fresh perspectives.
- Look to the future, anticipating the needs of our employees and clients.

Fantastic Results- Contributing to NFP's financial and/or overall success. Employee contributions to producing fantastic results includes:

- Collaborating and work as a team.
- Earning trust by exceeding expectations.
- Delivering peace of mind through amazing performance.

Personal- Delivering the best possible solutions, which delight customers and build strong personal relationships. To be personal, employees must:

- Respect each other. We all matter.
- Build enduring relationships.
- Give back.
- Be real. Be authentic. Be genuine.

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Ratings Scale

The manager will rate their employee's performance on each aspect of the **NFP Way** using a 3-star rating system. The definitions for each rating is shown below:

⭐⭐⭐   **3 - Exceptional** - Consistently delivers truly exceptional results and exceeds expectations

⭐⭐   **2 - Successful** - Performing successfully and meeting expectations

⭐   **1 – Room for Improvement** - Not consistently meeting expectations

Viewing Your NFP Way Feedback

While you don't have the ability to alter the content of the **NFP Way Feedback** categories, you *do* have the option of adding **Journal Entries** to track your progress over the course of the year in each category. Your manager has the ability to see your **Journal Entries** and create their own.

To view your **NFP Way Feedback**, click on the **NFP Way Feedback** tab on the **Career & Education** page.
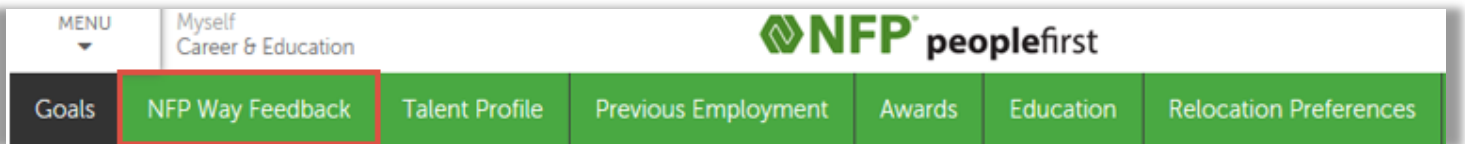
This will take you to the **NFP Way Feedback** page. Here you can get detailed descriptions of the **NFP Way**, as well as enter **Journal Entries** for each feedback category.
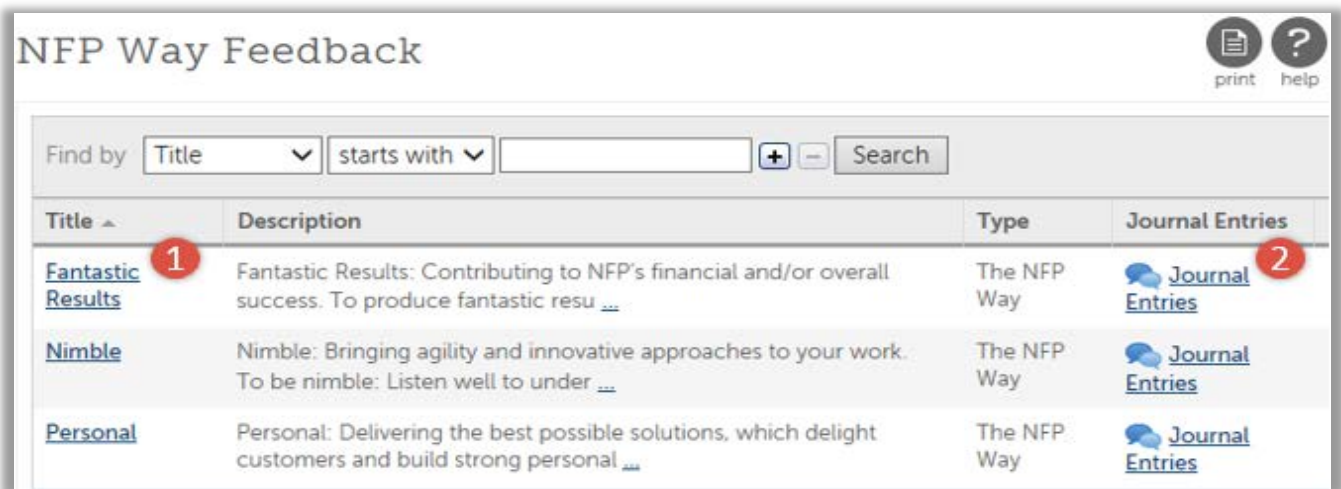
1. **Title**- Click on the **NFP Way** title to read detailed descriptions of each category.
2. **Journal Entries**- Click on the **Journal Entries** link to read existing **Journal Entries** and create or edit entries of your own.

Creating NFP Way Feedback Journal Entries

As the year progresses, you may choose to update your **NFP Way Feedback** using the **Journal Entry** feature. This feature allows you to enter comments about each **NFP Way** category as important milestones are reached throughout the year.

1. To create an **NFP Way Feedback Journal Entry**, click on the link under the **Journal Entries** column.
2. This will take you to the **NFP Way Feedback Journal Entries** page. The **NFP Way Feedback Journal Entries** page has the following fields:

- ▪ **Comments**- enter your journal comments here. This can be anything from an observation about a success you've experienced to a personal note to check in on something later (see visibility, below).
- ▪ **Visibility**- You can elect to make your journal entries public or private.
  - o **Public**- If you choose to make your entry public, your manager will be able to read your **Journal Entry**. Choose this option if you are entering additional information you want them to consider during your review.
  - o **Private**- You can create a **Journal Entry** that is only viewable by you, the employee. This means that your manager will *not* see the note you've created. Choose this option to create a reminder of an action you need to follow up on later or to take

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note of potential obstacles you are facing.

> ⚠️ System administrators can see all entries, and documentation is subject to subpoena as needed. Be conscientious and professional at all times.

- ▪ **Include in Review**- Select this option to include your journal entry in your annual **Performance Summary** review. Your manager and any contributing reviewers will be able to read your entry.

3. When you've entered your journal entry, click **Post** to save it to the **NFP Way Feedback**.

4. This will return to the **NFP Way Feedback Journal Entries** page. All journal entries you've created for your **NFP Way Feedback** will be displayed here. Your manager also has the ability to enter **Journal Entries** of their own. You will see their (public) comments here as well.

Dave Matthews said...
11/09/2016 1:56 PM

Journal Entry by Manager - Public & Include

Chris Martin said...   Edit | Delete
11/09/2016 1:47 PM

Journal Entry by Chris - Public & Include in Review

5. Click on the **Edit** or **Delete** links to remove or correct any entries you've entered on this page. You can only edit or delete your own entries, not your manager's or additional contributor's.

6. To return to the **NFP Way Feedback** home page at any time, click the **Return** button on the top right of the page.
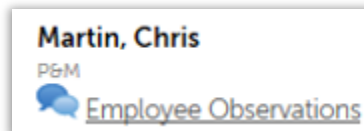
Employee Observations

Not everything you do throughout the year will fit neatly within your **Goals** or **NFP Way Feedback** categories. The **Employee Observation**s section is available for any other feedback you wish to provide. It may contain further clarification on goals and competencies, provide some insight into your overall performance, or it may be something important that you want to ensure is included in the review.

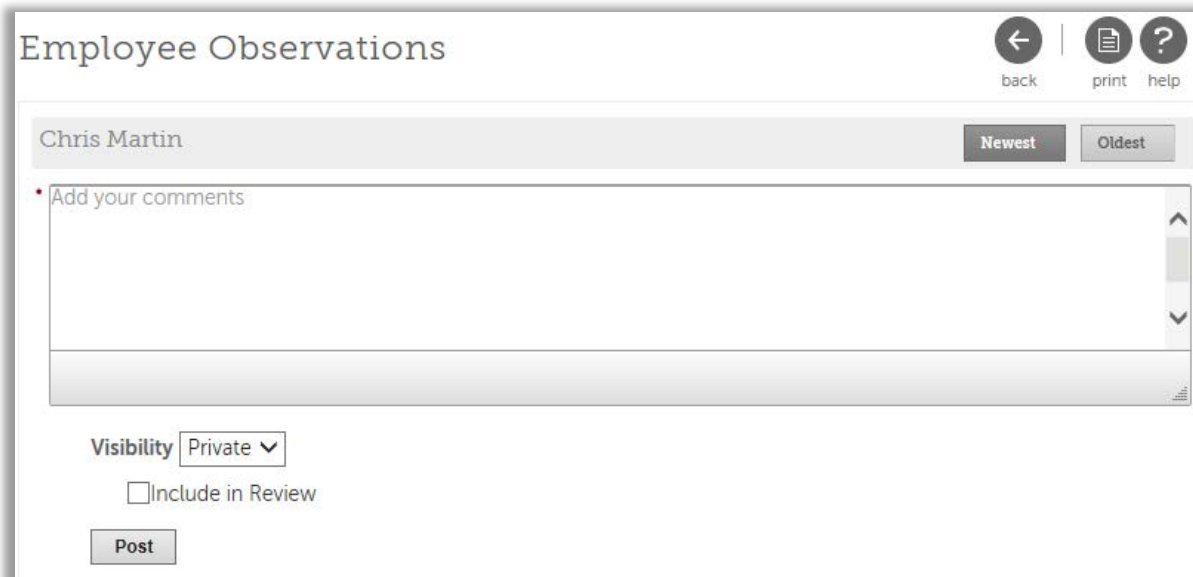**people**first: development | ◈ **NFP**®

1. To view your **Employee Observations**, click on the **Talent Profile** tab on the **Career & Education** page.
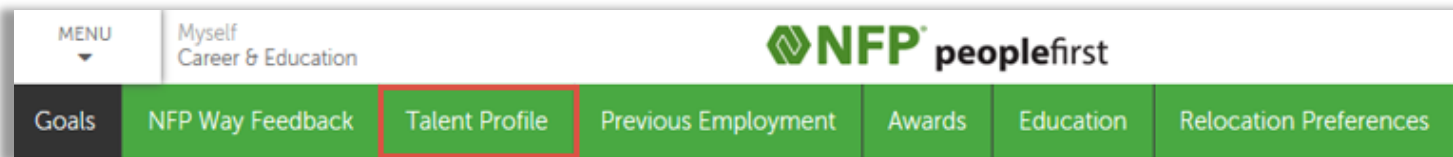
2. You will arrive on the **Talent Profile** page. Click on the **Employee Observations** link to create your entry.

3. This will take you to the **Employee Observations** page where you will see the following fields:

- **Comments**- enter your observation comments here. This can be anything from an observation about a success you've experienced to a personal note to check in on something later (see visibility, below).
- **Visibility**- You can elect to make your **Employee Observations** public or private.
  o **Public**- If you choose to make your entry public, your manager will be able to read your **Employee Observation**. Choose this option if you are entering additional information you want them to consider during your review.
  o **Private**- You can create an **Employee Observation** that is only viewable by you, the employee. This means that your manager will *not* see the note you've created. Choose this option to create a reminder of an action you need to follow up on later or
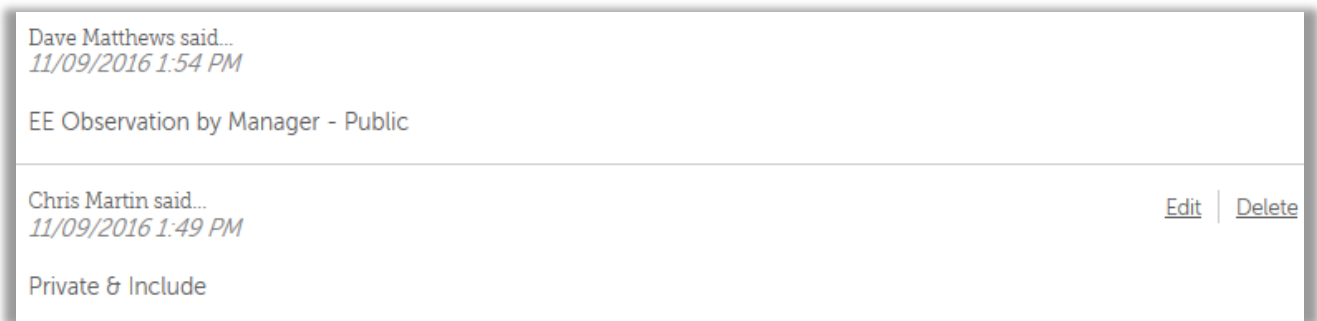
to take note of potential obstacles you are facing.

> **(!)** System administrators can see all entries, and documentation is subject to subpoena as needed. Be conscientious and professional at all times.

- **Include in Review**- Select this option to include your observation in your annual **Performance Summary** review. Your manager and any contributing reviewers will be able to read your entry.

4. When you've entered your comments, click **Post** to save it to the **Employee Observations**.

5. All entries you've created for your **Employee Observations** will be displayed here. Your manager also has the ability to enter **Employee Observations** of their own. You will see their (public) comments here as well.

Dave Matthews said...
11/09/2016 1:54 PM

EE Observation by Manager - Public

Chris Martin said...
11/09/2016 1:49 PM   Edit | Delete

Private & Include

6. Click on the **Edit** or **Delete** links to remove or correct any entries you've entered on this page. You can only edit or delete your own entries, not your manager's or additional contributor's.

7. To return to the **Talent Profile** home page at any time, click the **Back** button on the top right of the page.

Viewing Your Completed Performance Summary

Once your manager has completed you annual Performance Summary, you will be able to view your overall rating and manager's journal entries on the PeopleFirst Portal.

1. To locate your review, click on the **Menu** button on the top left of the page. Select the **Myself** tab, then click on the **Reviews** link under the **Jobs** menu.
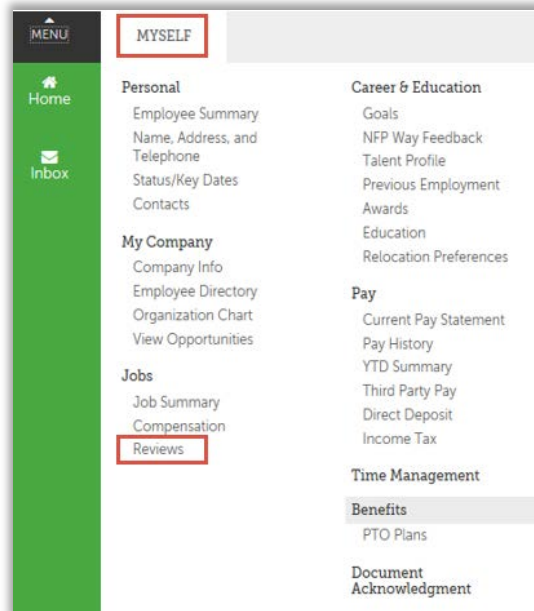
2. This will take you to the **Reviews** page. Here you can pull up past reviews and read manager comments and journal entries.

   o **In Progress-** In most scenarios, unless you are actively participating in the **Performance Summary** process, this area will be empty. You will not see your review listed here while your manger is completing it.

   o **History-** Here you will see a list of past Performance Summaries. At a glance, you can see the date of the review, the person who reviewed your performance, and the overall rating.

   o **Links-** To dive deeper into your annual Performance Summary, click the link under the **Effective** column.

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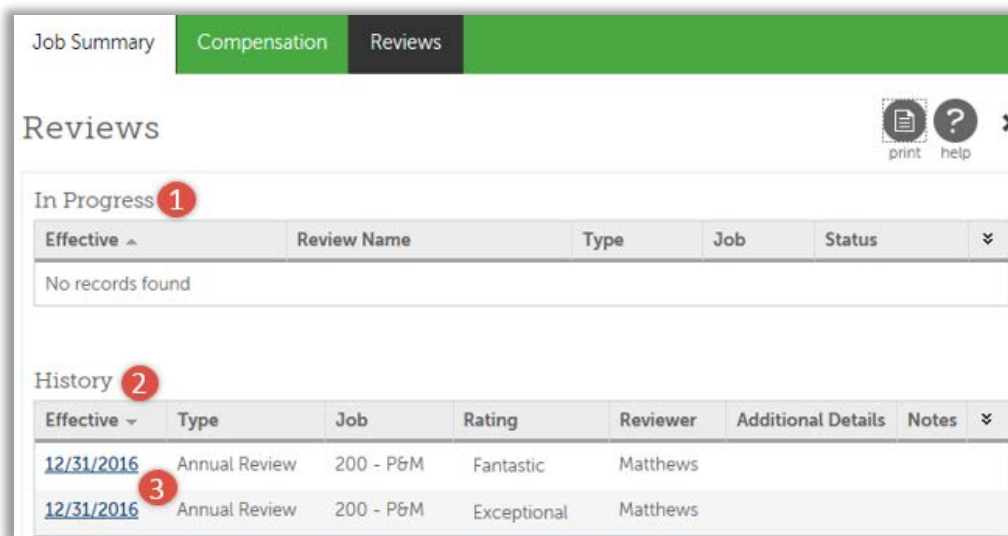
Reading Your Performance Summary

Your **Review Summary** contains the following sections:

1. **Employee Observations** – Clicking on this link will show any **Employee Observations** that you created and chose to include in your review, as well any of your manager's observations.
2. **Contributor**s- Anyone who contributed to your review, including your manager, will be listed here.
3. **NFP Way Feedback**- Click **View** to read the journal entries that you and your manager created and chose to include in the review.
4. **Overall Comments**- Click **View** to read your manager's overall comments for your annual review.
5. **Final Score**- this will display the weighted average of your **NFP Way** feedback.
6. **Final Comments**- Your manager will wait to enter the final comments until after your last check-in, when you go over your **Performance Summary**. You will see their comments here.

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Additional Learning Opportunities

Discover more about performance management by clicking the links below:

- [View the tutorial of Talent Management for Employees](#)
- [SMART Goals Worksheet](#)
- [Writing SMART Goals](#)
- [Preparing for a Career Aspiration Conversation](#)

Support

Should you have questions on performance management process or methodology, please contact your HR Business Partner or email humanresources@nfp.com. If you need additional support or would like to ask a question regarding PeopleFirst Portal functionality, you can reach the PeopleFirst Portal administration team at [pfpadmin@nfp.com.](mailto:pfpadmin@nfp.com)

This guide, along with all of the links to resources shown on this page can also be found in the *Manager Guide* in the **PeopleFirst Portal** under the **My Company** menu:

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