

C-12: **(FCC Menu # 14)** On June 25, 2012 Univision's Human Resource department conducted a training session specifically targeted to new managers but also included refresher points for all other experienced managers with subordinates. The training not only included new manager orientation, but also included topics including policy on sexual harassment, individual and manager evaluation procedures, setting SMART goals, and how to prepare written documentation for performance issues.

Blanca Gaytan

From: Fely Garcia
Sent: Tuesday, March 19, 2013 11:14 AM
To: Blanca Gaytan

When: Monday, June 25, 2012 10:00 AM-11:00 AM (GMT-06:00) Central Time (US & Canada).

Where: Conference Room

Note: The GMT offset above does not reflect daylight saving time adjustments.

~~*~*~*~*~*~*~*

YOU'RE INVITED!

From: Corporate Human Resources Department – Central Region

2012 Goal Setting Module

Our training session will be conducted on

**Monday , June 25TH
At 10:00 AM CST**

Among the many advantages of this new online process, this module will:

- Allow you and your teams to track and report progress on goals
- Automatically feed information into next year's performance reviews
- Allow you to formally set Development plans for yourself and/or your teams

Please note this training is meant for all employees (not only managers) and will last one hour.
Thank you for your commitment to build a performance based organization.

NOTE THERE IS ANOTHER TRAINING SCHEDULED AT 2P CST ON MONDAY, JUNE 25TH. PLEASE CHECK WITH YOUR SUPERVISOR TO COORDINATE YOUR ATTENDANCE.

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10am - Austin

Ruben Poblado

Eva Gonzalez Smith

Joshua Frescas - Joshua Frescas

Ismael Martinez

Adrian Salazar

Elizabeth Rubio

Yareiza Otero

Fely Garcia

Ken Barnett

Blanca Gautan

Irais Galvez

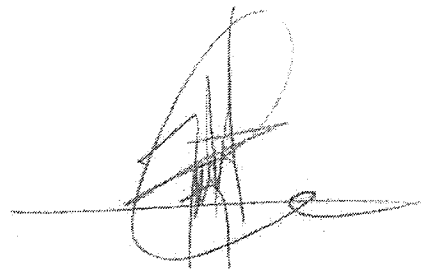
2PM LBA King

Orlita Barretto

Adelfo Segura

Jessica Mason

Brittany Brown



Eva Gonzalez Smith



Ismael Martinez



Elizabeth Rubio

Yareiza Otero



Ken Barnett

Blanca Gautan

Irais Galvez

LBA King

Orlita Barretto

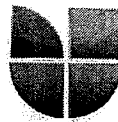
Adelfo Segura

Jessica Mason

Brittany Brown

Univision Performance Management:

2012 Goal Setting



Objectives

- ✓ To understand what makes a good goal and how to set it effectively
- ✓ To understand how to set goals online
 - > Business / Organizational goals
 - > Development Goals
- ✓ To review the 2012 timeline for setting business and development goals



Agenda

- ✓ Effective Goal Setting:
 - > What's in it for me?
 - > What goes into a goal
 - > How to set a goal
 - > How to set a SMART goals
- ✓ Entering, approving and updating performance goals
- ✓ Entering Individual Development Plans
- ✓ Timeline and Next steps

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Why Goal Setting Is Important

- ✓ Teams and Organizations perform at their best when:
 - > Every employee, team and department is pulling in the same direction
 - > Goals throughout the organization are linked to the Company's overall strategies and objectives
- ✓ Individuals perform at their best when:
 - > They understand what is expected of them, and how their performance will be measured
 - > They can take part in developing their own goals



Effective Goal Setting

- ✓ Generally speaking, goals:
 - > Address Problems, Processes, Practices, People
 - > Aim to Achieve, Preserve, Avoid, Eliminate
 - > Focus on outcomes, not activities that an individual can control
- ✓ To make them effective, there should be Employee input and Alignment with business unit's goals
 - > Increases commitment and ensures organizational alignment

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Effective Goal Setting: Alignment with Business Unit


- Aligns individual and team effort to Company's priorities (vertical alignment)
- Helps eliminate activities unrelated to company performance

Increase Advertising revenue by 8% nationally by end of Q2, 2012

Increase Advertising revenue by 10% in the Central Region by end of Q2, 2012

Increase Houston-based Advertising revenue by 10% by end of Q2, 2012


6



Effective Goal Setting: SMART Goals

- S** • Specific
- M** • Measurable
- A** • Achievable
- R** • Relevant
- T** • Time Bound

7



Specific

- ✓ Answer the questions:
 - > Who?, Who (again)?, What?, Why?, When?, How?
- ✓ Your responses should be:
 - > Clear & unambiguous
 - > Detailed & focused



Measurable

- > Measuring helps you objectively determine whether a goal was achieved
- > "If you can't measure it, you can't manage it!"
- > They provide tangible or observable evidence of completion



Achievable

- ✓ This does NOT mean easy!!
- ✓ Goals should challenge employees to and help them grow, without being unattainable
- ✓ Unrealistic goals result in demotivation, frustration, and decreased performance
- ✓ Think about your resources:
 - > Skills, Equipment, Staff bandwidth, Priorities



Relevant

- ✓ Goals should be meaningful to the individual
 - > Provide intrinsic motivation
- ✓ Goals should be meaningful to the organization
 - > Be connected to the larger organization's objectives
 - > Cascade goals whenever possible
- ✓ Engaging employees in the goal setting process facilitates creating relevant goals.
- ✓ Follow 80/20 rule. Where will you make a bigger impact?

11



Time-bound

- ✓ Deadlines should create a sense of urgency
 - > Slightly challenging deadlines will produce higher effort than goals that allow ample time
 - > Request employee input as to when a goal can be completed.
- ✓ You may break up larger goals into smaller, more manageable milestones
 - > Provides opportunity for ongoing clarification, follow up and feedback

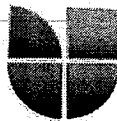


Effective Goal Setting: Best Practices

- ✓ Importance of Feedback
 - > Without it, individuals do not know how they are doing, so they can't adjust effort or strategies.
 - > Request feedback early and often
 - > Should become a normal part of doing business
- ✓ Give recognition for results
- ✓ Individual meetings are important
- ✓ E-mail does not replace face-to-face time

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Section 2: Setting Goals online





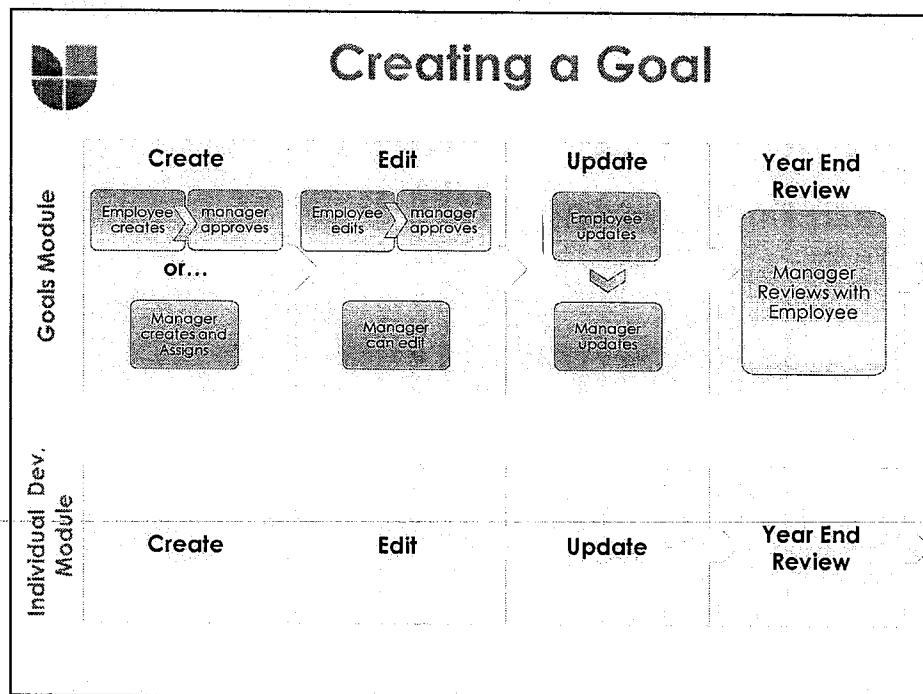
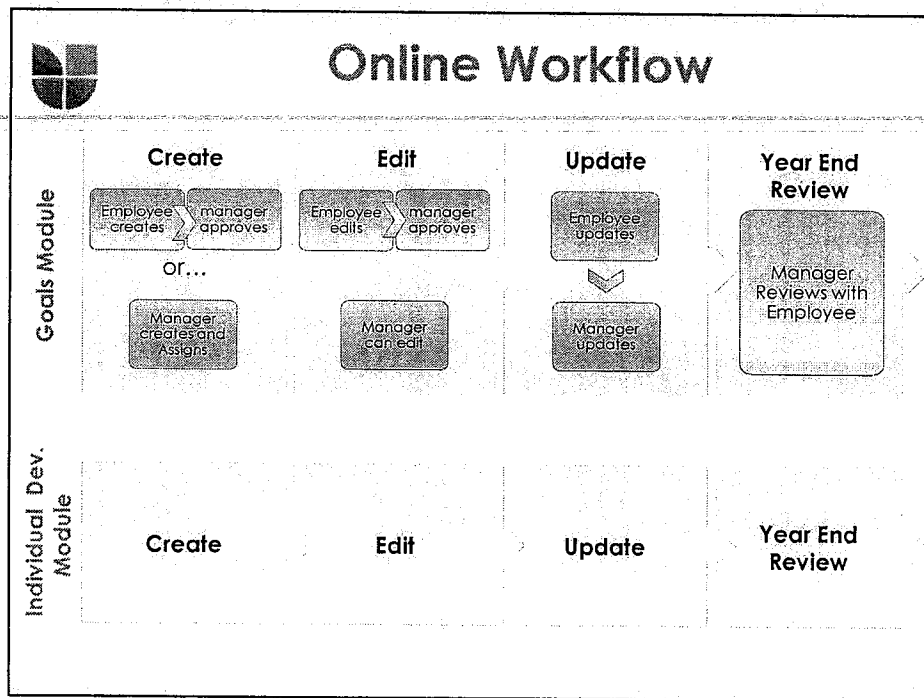
Types of Goals

- ✓ **Business Goal:** When achieved, will result primarily in a business benefit, such as increased revenue, lower cost, a deadline met, etc...
 - > Sales Target
 - > Budget variance
- ✓ **Organizational Goal:** When achieved, will result in a team benefit or leadership effectiveness benefit, such as increased diversity in workgroup, etc...
 - > Reduce turnover to 10%
 - > Cross train team to ensure skills
- ✓ **Personal & Professional Development Goal:** When achieved, will result in the enhancement of your skills and/or effectiveness to do the job



Types of Goals

- | | | |
|------------------------|---|---|
| Goals Module | { | ✓ Business Goal |
| | | ✓ Organizational Goal |
| Individual Dev. Module | { | ✓ Personal & Professional Development Goal |





Creating Goals

✓ Same initial steps for manager or employee

UNIVISION

Welcome to Univision's Intranet site, Martha Ruiz-Cornejo

Univision Prosa Release

UNIVISION ANNOUNCES THE 12 FINALISTS IN THE 8TH SEASON OF ITS LAT REALITY COMPETITION "NUESTRA BELLEZA LATINA"

The 12 chosen contestants will move into a Miami mansion and face grueling challenges while vying for the coveted crown.

APRIL 11, MARCH 26, 2012 - The season marks an impressive record with competition "Nuestra Belleza Latina" (our Latin beauty) - currently, it is most watched season to date - enters the most demanding and exciting phase. During last night's seasonally changed broadcast, half of the previous 24 semi-finalists were eliminated.

Quick Links:

- Home
- Performance
- My Tools
- My Tasks
- My Inbox

Documentation:

- Univision's new Web Application
- Performance Review: Employee Guide
- Performance Review: Manager Guide
- Performance Review: Manager User Guide
- Performance Review: Employee User Guide
- Development Plan Guide - Employees
- Development Plan Guide - Managers



Creating Goals



Welcome

Performance Management Home Page

Annual Performance Appraisal

Year Development Plan

Among the most common of activities are to set performance and learning objectives, identify performance appraisal periods, set performance appraisal periods, and create the appraisal and review process.

1. The performance appraisal process is to assess and measure individual performance.
2. Establishment of goals for the appraisal period.
3. To identify appropriate performance appraisal periods.
4. To identify appropriate performance appraisal periods.

Through this process, the employee and manager can identify development areas, improve performance and grow performance within the organization.

Your role is to assist in the development and implementation of the performance appraisal process.

Documentation

Univision's new Web Application

Performance Review: Employee Guide

Performance Review: Manager Guide

Performance Review: Manager User Guide

Performance Review: Employee User Guide

Development Plan Guide - Employees

Development Plan Guide - Managers

My Tasks

Click here to see my tasks

My Inbox

Click here to see my inbox



A Manager or an employee can create a goal

- ✓ Same steps for initial creation of goal
- ✓ Discuss your goals with your manager first.
- ✓ Limit goals to 5-7.

The screenshot shows the Univision system interface. At the top, there's a navigation bar with 'Home', 'Performance', and 'Administrative Tools'. Below this, the user is logged in as 'Gomez - Adam Sandoz'. There are two buttons: 'Create' (highlighted with a red circle) and 'Hierarchy'. Below the buttons, there's a table with columns: 'Goal', 'Due Date', 'Priority', 'Range', 'Status', 'Program', and 'Assignee'. The table contains one row with the goal 'Increase sales of the new product of the company' and a due date of '12/31/2012'. At the bottom, there are buttons for 'Save', 'Cancel', and 'Print'.



Creating a Goal

Create Goals

The screenshot shows the 'Create Goals' form. It has several sections: 'Goal', 'Description', 'Start Date', 'Due Date', 'Category', 'Action Steps & Milestones', and 'Check if you want your team to see it'. The 'Goal' section has a text area with the goal 'Increase sales of the new product of the company'. The 'Description' section has a text area with the description 'Increase sales of the new product of the company'. The 'Start Date' is set to '12/31/2012'. The 'Due Date' is set to '12/31/2012'. The 'Category' is set to 'Sales'. The 'Action Steps & Milestones' section has a text area with the action steps 'Increase sales of the new product of the company'. The 'Check if you want your team to see it' section has a checkbox that is checked. There are annotations with red circles and arrows pointing to the 'Enter Goal' text, the 'Describe the Goal' text, the 'Enter due date' text, and the 'Check if you want your team to see it' checkbox.



Creating a Goal

- ✓ Is it Business or organizational?
- ✓ Each goal should have specific action steps

UNIVISION

Create Goals

Description: [Text Area]

Add Action Steps: [List of Categories]

Select the Category

Add action steps



Entering Action Steps

- ✓ After entering action steps, you are done.

UNIVISION

Add Action Steps & Measures

Description: [Text Field]

Start Date: [Date Field] End Date: [Date Field]

Save Cancel

Keep it simple

Hit submit!

Goals and Action Steps are different

Goals

- > To buy a home by 2013

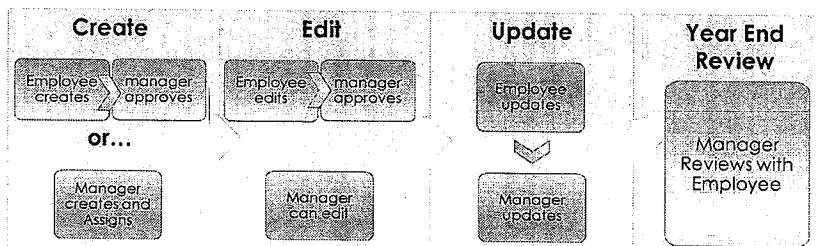
Action Steps

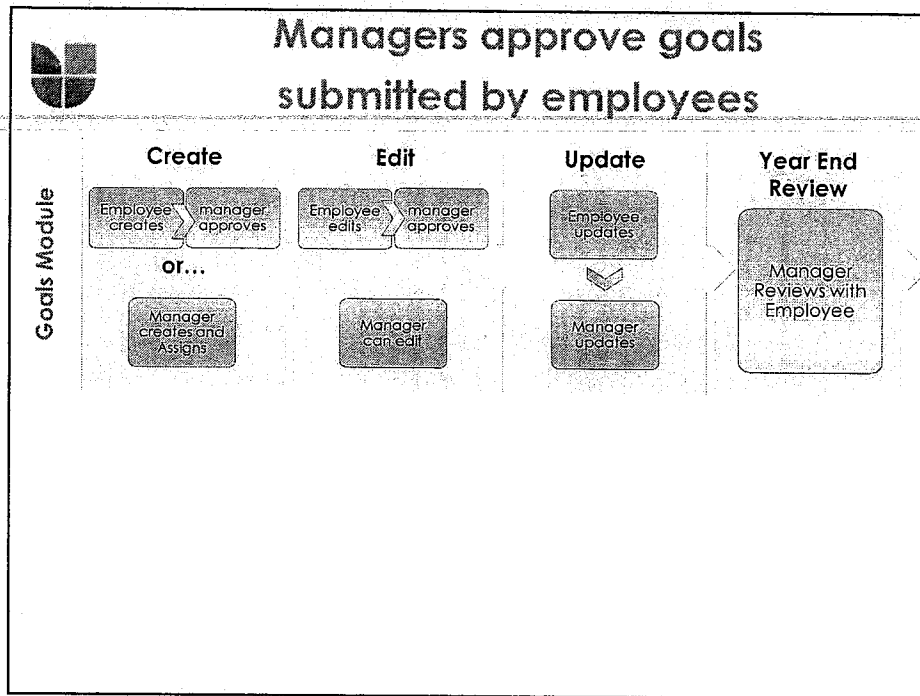
- > Review Credit score
- > Get prequalified for a Loan
- > Find a reputable Realtor



Employee creates a Goal

Goals Module





Manager's view:

✓ Managers will see pending approvals in their inbox

[Home](#)
[Performance](#)
[My Team](#)
[Reports](#)
[Organization Chart](#)

Welcome, Joe, to the Univision Performance Management Home Page. **STAGE**

Annual Employee Performance Appraisal Process

Introduction

Univision's performance review is a clear understanding of what goals or objectives are to be performed and achieved. This is a performance appraisal process that can give the employee a clear understanding of what is expected and ensure that objectives and processes are aligned.

- The annual performance review is to assess and measure individual performance.
- Established goals for the upcoming evaluation period. No directly reportable for the entire year and also a goal.
- Annual performance review is to assess and measure individual performance.

"Through this process the employee and manager can align to appropriate goals and objectives and ensure that they are aligned with the organization."


Managers will also be able to see the performance of their team through the system by clicking on the appropriate link below.

My Tasks (Click here to go to)

My Team

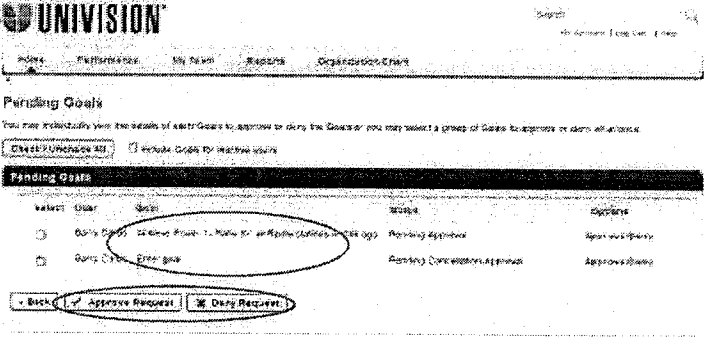
My Inbox

Approve Goals (Click here to go to pending approvals)



Manager approves goals

- ✓ Managers can approve, deny (batch)
- ✓ Managers can edit goals



Pending Goals

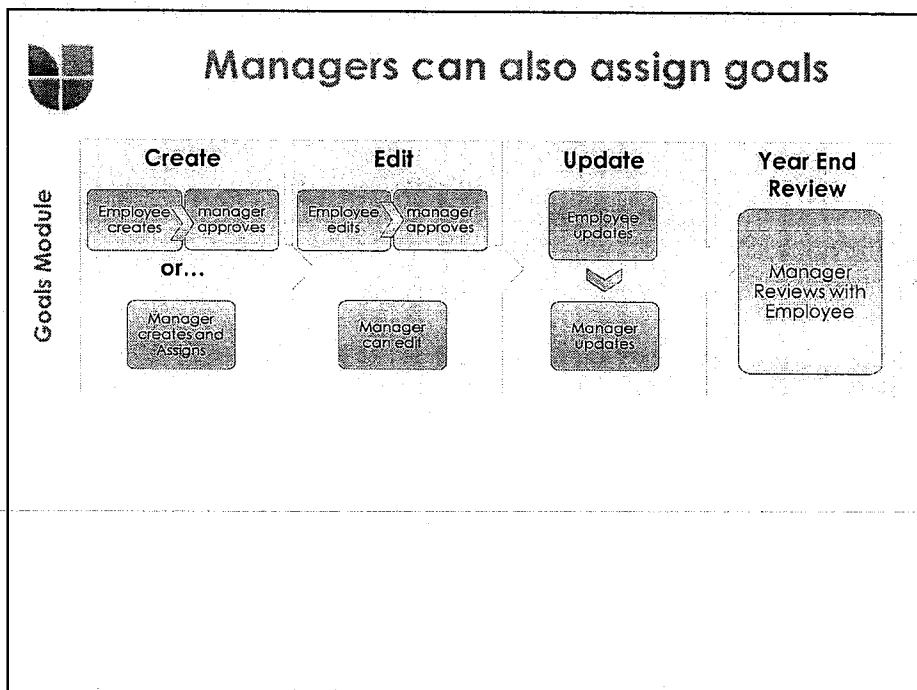
You may individually view the details of each Goal to approve or deny the Goal or you may select a group of Goals to approve or deny all at once.

☐ Select All ☐ Refresh Goals to refresh goals

User	Goal	Status	Actions
Goal 1	Goal 1	Pending Approval	Approve Request
Goal 2	Goal 2	Pending Approval/Approve	Approve Request

[Back](#) [Approve Request](#) [Deny Request](#)

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Once goal has been created

Create Goal

688

Once a goal has been created, it is assigned to a specific user. When a user is assigned a goal, the user will see the goal in their dashboard. The goal will be assigned to the user based on the user's role and the goal's category. The user will be able to see the goal in their dashboard and will be able to track the progress of the goal.

Goal:

To have 100% of the team's work completed by the end of the year.

Destination:

100% of the team's work completed by the end of the year.

Weight: 100% (100% of the team's work completed by the end of the year)

Start Date: 1/1/2012

Due Date: 12/31/2012

Weight: 100%

Visible to Direct & Indirect: ☒ (Direct & Indirect users can see and report progress)

Category: Team Building

Action Steps & Milestones:

Start Date

Due Date

Options

Category: Team Building

Start Date: 1/1/2012

Due Date: 12/31/2012

Options: ☒ ☐

Attachments: Upload Documents

Save as Draft Cancel **Next**



Manager can assign goal to their team

Assign

There are only two ways to assign a goal to a team.

Assign to: ☒ Direct ☐ Indirect

Assigning:

☒ Direct & Indirect users can see and report progress

☐ Direct & Indirect users can see and report progress

Assign Manager

Assign Goal

Assign Goal

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Manager's can assign goals to others outside their teams



Home Performance My Team Reports Organization Chart

Goal and Note

Create Goals

Assign

Please only select "Users" in the dropdown

Assign To: ☐ Yourself ☐ Your Team ☐ Users ☐ (Search from dropdown)



Searching for other users

Find by last name

Search is empty

Last Name: Manager's Last Name:

12 Results

User ID	Manager	Manager's Last Name	Manager's First Name
2504 M	Manager	Manager	Manager
2504 M	Manager	Manager	Manager

Assign

Please only select "Users" in the dropdown

Assign To: ☐ Yourself ☐ Your Team ☐ Users ☐ (Search from dropdown)

Setting:

☐ Create a separate goal for each user

☐ All users not shown in this dropdown are progress

☐ Add Change Notice ☐ Include Down Report

Submit and you are done!



Once the manager submits, the goal will be visible to the employee

HOME Performance Organization Chart

Goals - Barry Cards

Verify performance goals for the coming performance year. If you are a manager, your employees whose portion of the goals that you are responsible for them. If you are an employee, you will see the goals for your manager. Download your list of goals that have been assigned to you. To go to the goals for your manager, click on the link below.

[Create](#) [History](#)

Search: From: To: [View](#) ☐ Hide Completed ☐ Hide Completed

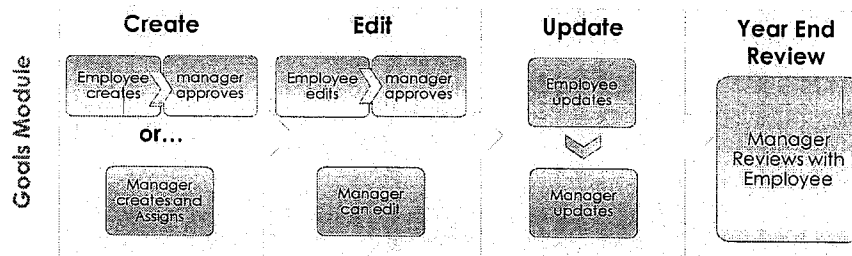
Details

My Goals

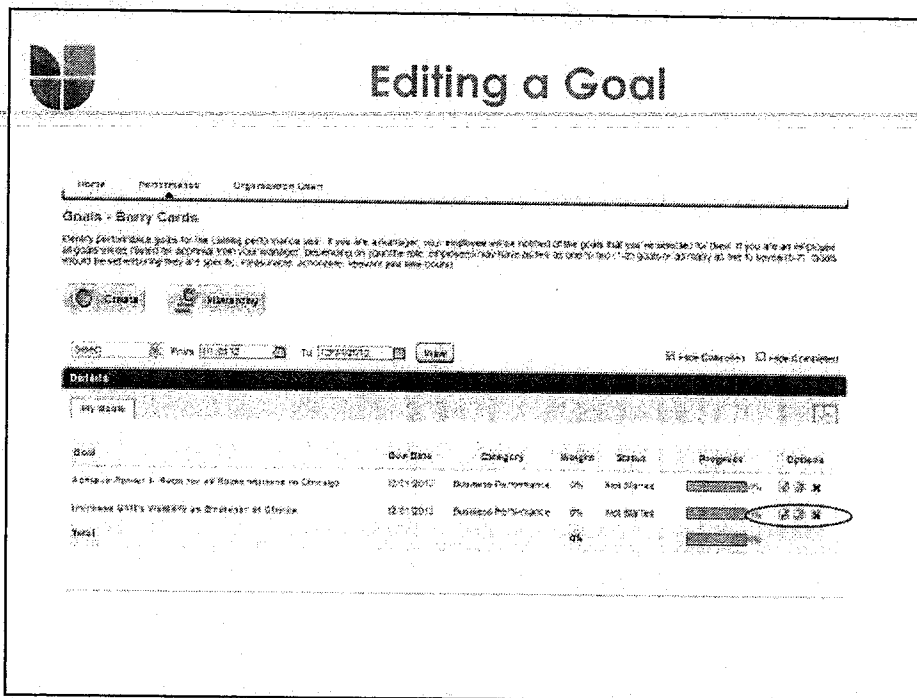
Goal	Due Date	Category	Weight	Status	Progress	Options
Improve Patient Care for all Patients in Chicago	12/31/2012	Business Performance	0%	Not Started	<div><div></div></div>	Edit Delete
Improve Patient Care for all Patients in Chicago	12/31/2012	Business Performance	0%	Not Started	<div><div></div></div>	Edit Delete
Total			0%		<div><div></div></div>	



Employees or managers can edit goals



Employee edits must be approved by manager



Editing a Goal

Home Performance Organization Unit

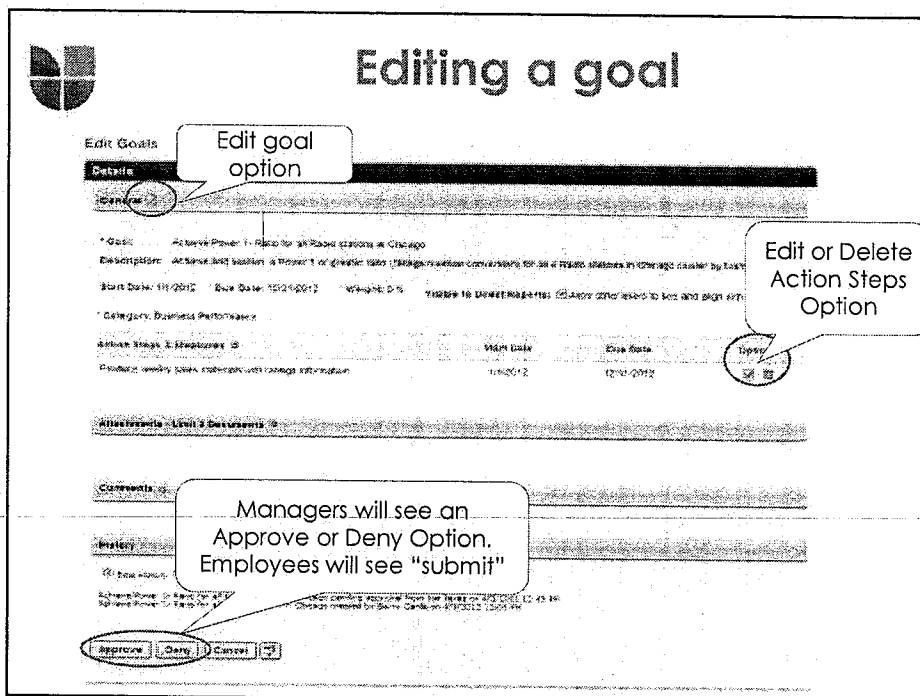
Goals - Barry Cards

Clearly performance goals for the coming performance year. If you are a manager, your employee will be notified of the goals that you've selected for them. If you are an employee, you will be notified of the goals that your manager has selected for you. You can edit or delete your goals at any time. You can also add new goals at any time. You can also add new goals at any time. You can also add new goals at any time.

Details

Goal Name:

Goal	Due Date	Category	Weight	Status	Progress	Options
Active Power 1-Rate for all Road stations in Chicago	12/31/2012	Business Performance	5%	Not Started	<div></div>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Increase Sales Volume as Director of Finance	12/31/2012	Business Performance	5%	Not Started	<div></div>	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Total			10%		<div></div>	



Editing a goal

Edit Goals

Details

Goal Name

Goal Active Power 1-Rate for all Road stations in Chicago

Description Active Power 1-Rate for all Road stations in Chicago (Manager will be notified of the goal that you've selected for them. If you are an employee, you will be notified of the goals that your manager has selected for you. You can edit or delete your goals at any time. You can also add new goals at any time. You can also add new goals at any time.)

Start Date 1/1/2012 **Due Date** 12/31/2012 **Weight** 5% **Status** Not Started

Category Business Performance

Progress

Options

Comments

History

Approve

Managers will see an Approve or Deny Option. Employees will see "submit"

Edit or Delete Action Steps Option



Adding or Deleting Action Steps

Add Action Steps & Measures

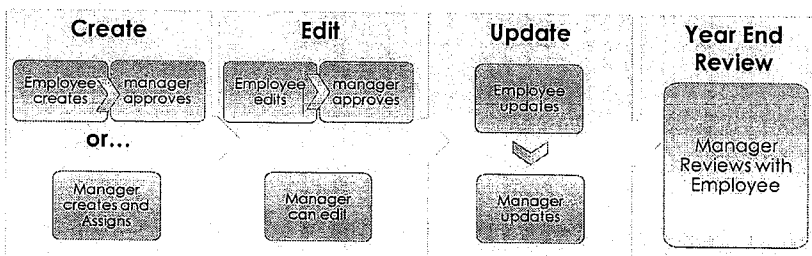
Description:


Start Date: End Date:



Updating Progress on a goal

Goals Module





Updating status/progress

Details

General

Goal: Increase LAR's Visibility as Employer of Choice

Description: Increase LAR's visibility as Employer of Choice with top local universities

Project ID: 10

Start Date: 03/20/12

Due Date: 12/31/2012

Status: In Progress

Category: Business Performance

Weight: 0%


Visible to Direct Reports: ☐ (Note: other users to edit and sign with this goal)

Attachments - Link Documents

Comments

History

[Back](#) [Save](#) [Cancel/Close](#)



Comments will be recorded

Details

General

Goal: Increase LAR's Visibility as Employer of Choice

Description: Increase LAR's visibility as Employer of Choice with top local universities

Project ID: 10

Start Date: 03/20/12

Due Date: 12/31/2012

Status: In Progress

Category: Business Performance

Weight: 0%

Visible to Direct Reports: ☐ (Note: other users to edit and sign with this goal)

Attachments - Link Documents

Comments

History


Comments

Barry Kuntz
 We need to increase our visibility as an employer of choice.

4/24/2012 12:54 PM

History

[Back](#) [Save](#) [Cancel/Close](#)



Update progress on action step

Details

General

Goal: Action Step: To Report for an Action step in Chicago
 Description: Action Step: To Report for an Action step in Chicago
 Program: [View Program](#)
 Start Date: 1/1/2012
 End Date: 12/31/2012
 Status: Incomplete
 Category: Business Performance
 Weight: 1%
 Visible in Direct Reports: All users can view this goal

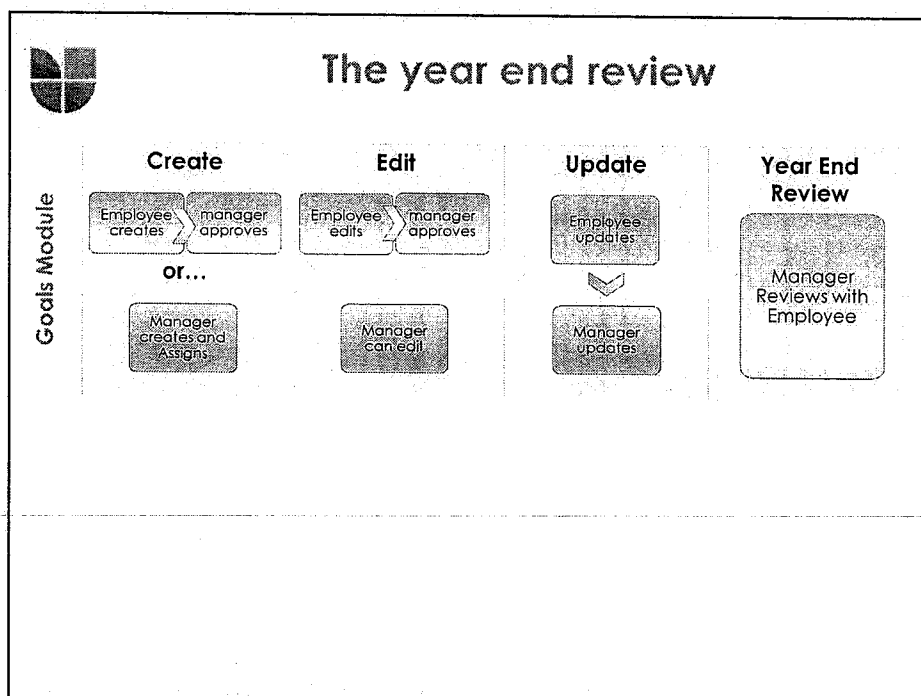
Action Steps & Measures

Description	Start Date	End Date	Progress
Provide each & update with ratings & feedbacks completed successfully	1/1/2012	12/31/2012	100%

Attachments - View Documents

Comments

History





Reviewing goal completion at the end of the year

Goals - Barry Cards

Review performance goals for the coming performance year. A new administrator will implement and be responsible for goals that have been set for them. If you are an employee, all goals will be tracked to determine your performance. Depending on your role, employees may have as few as one to as many as five to eight (5-8) goals. Goals should be the following: they are specific, measurable, achievable, relevant and time bound.

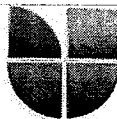
Details

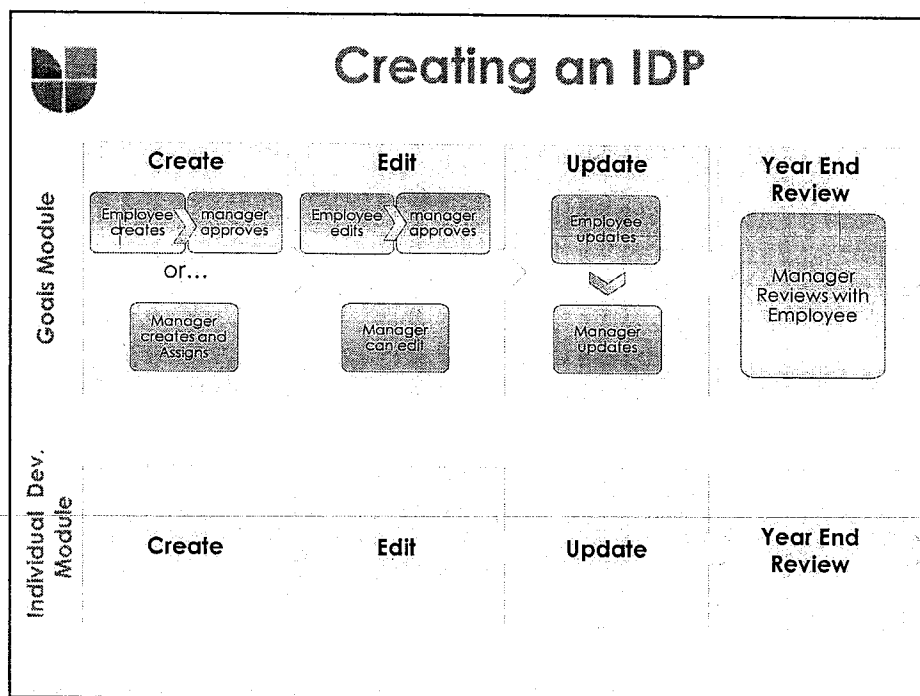
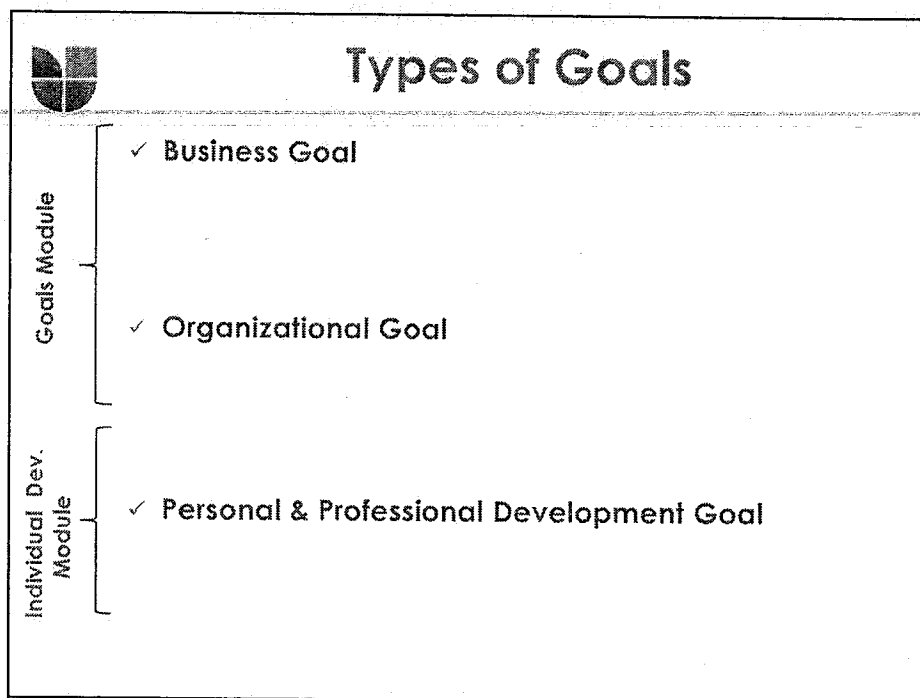
My Goals

Goal	Goal Date	Category	Weight	Status	Progress	Options
Implement Power 1-1000 for all Health Markets IP-Change	12/1/2012	Business Performance	0%	Completed	100%	
Increase User Adoption of Employee on Campus	12/31/2012	Business Performance	0%	In Progress	0%	
Total			0%		0%	

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Creating an Individual Development Plan







Creating an IDP

- ✓ IDP stands for Individual Development Plan
- ✓ Univision believes individual Development is a shared responsibility
 - > Management provide framework and help their employees by providing opportunities
 - > IDPs are created, owned and led by the individual.
- ✓ IDPs should be created every year after the Performance Review
- ✓ A good IDP should focus on 2-3 areas:
 - > One strength
 - > One or two areas of development

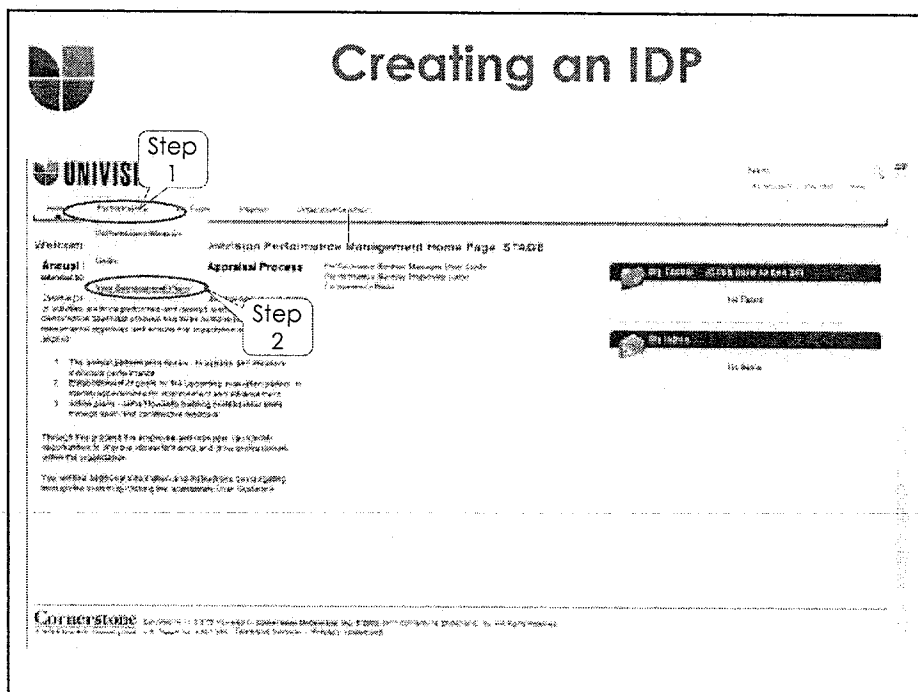
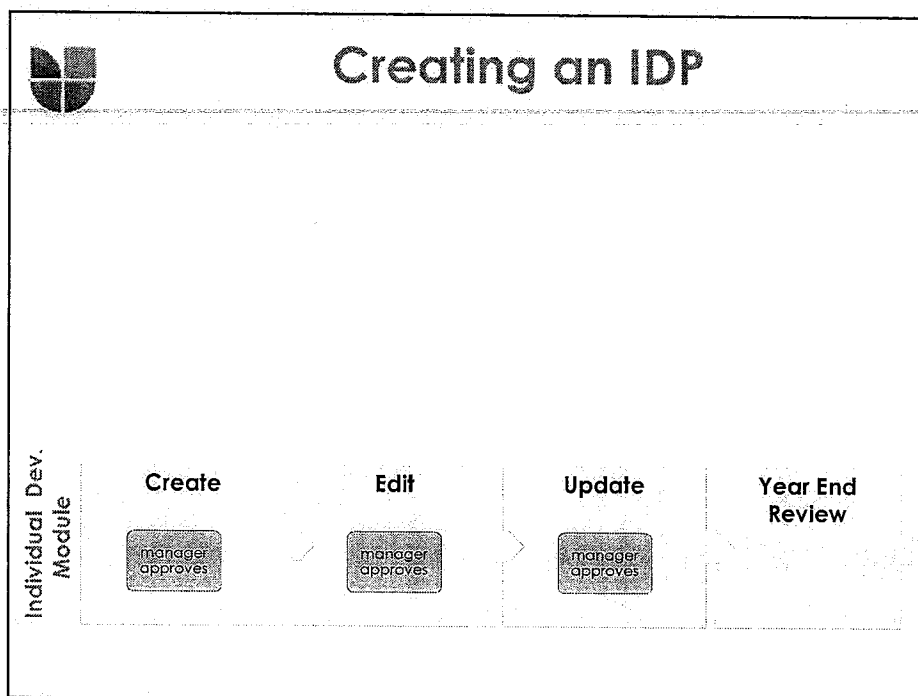
51



IDP Categories

- ✓ Professional Development
- ✓ Performance improvement

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Creating an IDP

Click the 'Create' button to create a new IDP. The IDP will be created with the following information:

IDP Information

IDP Title	IDP Owner	IDP Type	IDP Status	IDP Plan	IDP Notes
IDP Title	IDP Owner	IDP Type	IDP Status	IDP Plan	IDP Notes

Cornerstone Cornerstone is a leading provider of HR solutions. We are committed to helping our clients achieve their business goals through effective HR management. Our solutions include recruitment, compensation, performance management, and learning. We are proud to be a part of the Cornerstone family.

Create

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Creating an IDP

Click the 'Create' button to create a new IDP. The IDP will be created with the following information:

IDP Information

IDP Title	IDP Owner	IDP Type	IDP Status	IDP Plan	IDP Notes
IDP Title	IDP Owner	IDP Type	IDP Status	IDP Plan	IDP Notes

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Create

Enter Title (name and year)

Professional Development or Performance Improvement?

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Creating an IDP

The screenshot shows a web form titled "Create a Development Plan". It includes fields for "Title", "Priority", "Category", "Status", and "Due Date". Below these fields is a large text area for "Description". To the right of the description area, there is a section for "Learning Steps" with a list of items: "Re-read all emails before sending them out", "Organize thoughts before 1:1 meetings to be more assertive", and "Take 'Communicating effectively' webinar".

Annotations on the screenshot include:

- A callout box pointing to the "Description" field: "First add an objective".
- A callout box pointing to the "Learning Steps" list: "Example of learning steps".
- A callout box pointing to the "Learning Steps" list: "Then add steps to objective".

Creating an IDP

IDP	Objective	Steps
"Mickey Mouse Development Plan 2012"	Improve Communication skills	<ul style="list-style-type: none"> Re-read all emails before sending them out Organize thoughts before 1:1 meetings to be more assertive Take "Communicating effectively" webinar



Learning Activities

At least
70%

- ✓ **On-the-job Learning** Embedded in day-to-day activities, through new and challenging assignments within the individual's current role:
 - > Structured, on-the-job learning projects
 - > Participation in internal or external collaboration groups
 - > Mentoring from SMEs or leaders 1+ levels above
- ✓ **Off-the-job Training / Learning** Removes you from day to day:
 - > Internal training (e.g., classroom-based, online)
 - > External training (e.g., conferences, classes)
 - > Degree programs / tuition reimbursement
 - > Structured coaching programs such as LDP
- ✓ **Broadening work experiences:** Distinct assignments outside of normal boundaries of your role such as:
 - > Job rotations
 - > Cross-functional assignments



Manager approval of IDPs

Individual Dev.
Module

Create

Edit

Update

Year End
Review

manager
approves

manager
approves

manager
approves

[illegible]

UNIVISION

Home My Home Development Plan Approval

Development Plan Approval

Step 1

Approval Status

Request	Requester	Request Date	Request Status	Request Date	Request Status	Request Date	Request Status
2013 Development Plan Approval	John Doe	12/12/12	Pending Approval	12/12/12	Pending Approval	12/12/12	Pending Approval
2013 Development Plan Approval	John Doe	12/12/12	Pending Approval	12/12/12	Pending Approval	12/12/12	Pending Approval
2013 Development Plan Approval	John Doe	12/12/12	Pending Approval	12/12/12	Pending Approval	12/12/12	Pending Approval

Step 2

Step 3

Back Cancel Save

Manager can review specific action steps within IDPs

Development Plans

2012 Development Plan for Adam Sandier 4/9/2012

View: 8/10/2012 10:00 AM - 10:00 AM (10:00 AM - 10:00 AM) (10:00 AM - 10:00 AM) (10:00 AM - 10:00 AM)

Improve Time Management Development Objective

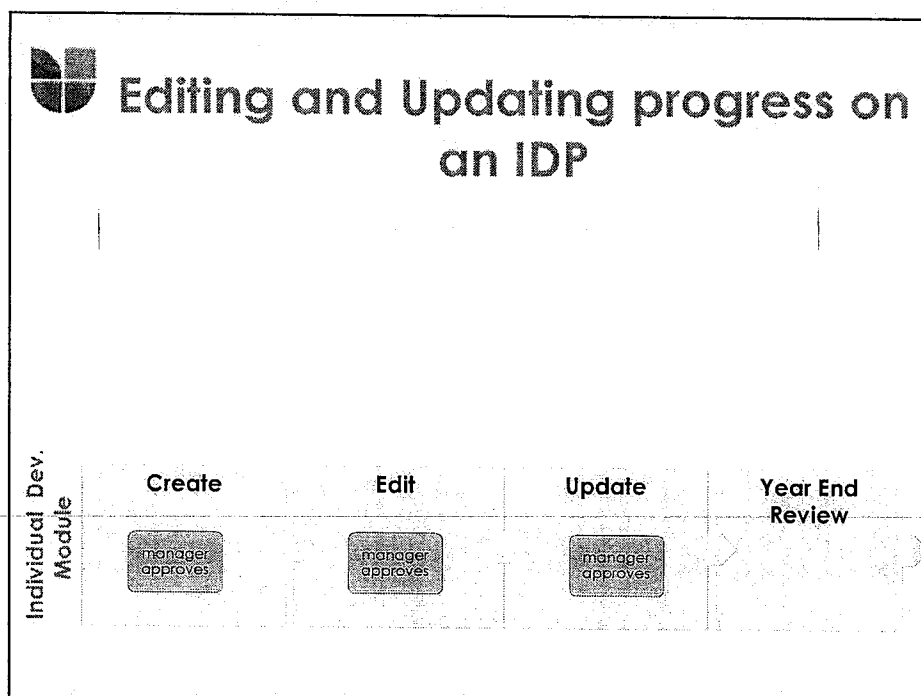
☐ Time Management (10/1/2012 - 10/1/2012) Completed 10/1/2012

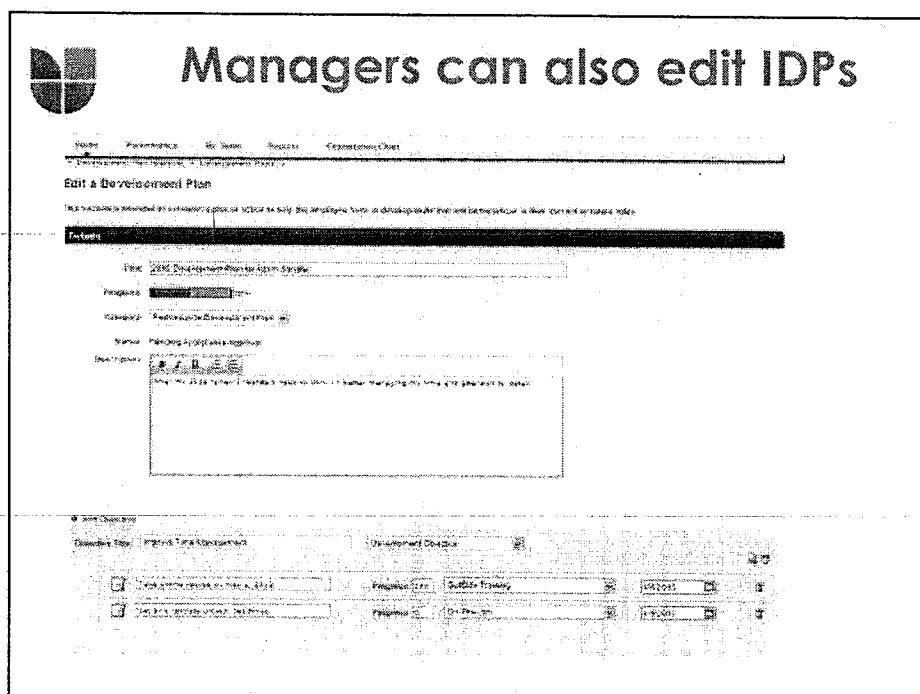
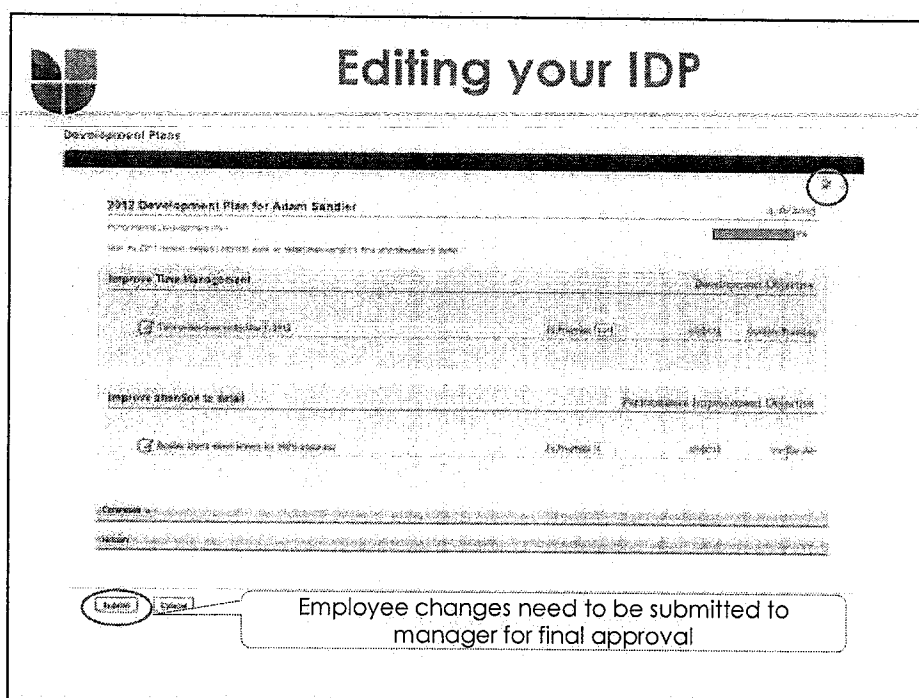
Improve attention to detail Performance Improvement Objective

☐ Attention to Detail (10/1/2012 - 10/1/2012) In Progress 10/1/2012

Continue Development Objective

Summary Development Objective





Updating progress on IDP

Development Plans

2012 Development Plan for Adams Sandoz

Performance Objectives

Objective	Status	Progress	Due Date
Improve time management	In Progress	50%	7/27/2012
Improve attention to detail	In Progress	50%	7/27/2012

Employees should update progress on their IDPs.

Save

Next Steps & Timeline

- ✓ Set time to discuss your goals with your manager
- ✓ Once you have obtained alignment on where you should focus for the balance of 2012, enter goals and IDPs on systems
- ✓ Goals should be in the system by July 27th.
- ✓ Plan for quarterly review of progress against goals

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