# Performance Process - Quick Reference Guide

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</table>
| 1. Establish **Performance Plan** | Institutional Goals (5 standard or 6 for supervisors)  
- Familiarize yourself with the each institutional goal and the “meeting expectations” standard for each goal  
- Identify any specific SOPs that correlate with each goal and document if necessary  
- Assign a weight of no less than 5% for each goal based on its importance to the position  
- Make sure all of the institutional goals add up to 50% | April 1 – Performance Cycle Begins | “Search” NinerTalent STAKES Guide  
See Performance Guide § “IV. Goals”: Institutional Goals  
Under NTS Performance Tools click SHRA Institutional Goals Expanded  
* SHRA Performance Policy |
| | Individual Goals (3-5 tasks)  
- Identify what the strategic goals are for your unit this cycle  
- Develop 3-5 SMARTER goals by determining any critical tasks or projects to be completed this cycle – should align with strategic goals  
- Assign a weight of no less than 5% for each individual goal based on its importance to the position  
- Make sure all of the individual goals add up to 50% | May 15  
**Note!** Process is not complete until plan meeting occurs and employee acknowledges plan | “Search” NinerTalent STAKES Guide  
See Performance Guide § “IV. Goals”: Individual Goals  
Sample performance documents can be found under the “NTS Performance Tools”  
* SHRA Performance Policy |
| | Career Development Goals  
- Document at least one career goal for this cycle to help gain or maintain knowledge, skills or abilities | | “Search” NinerTalent STAKES Guide  
See Performance Guide § “IV. Goals”: Career Development Plan |

**When establishing plan – 1.) Set goals  ➔  2.) Get next-level approval  ➔  3.) Meet w/employee to clarify goals  ➔  4.) Have employee acknowledge plan**
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<tr>
<td>2. Conduct <strong>Off-Cycle Reviews</strong></td>
<td>• Let your employee know how he/she is doing at this point in the cycle.</td>
<td>• Throughout cycle</td>
<td>“Search” NinerTalent STAKES Guide</td>
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<td></td>
<td>• Provide brief documentation about review in NinerTalent.</td>
<td>• April, July, October, January</td>
<td>View Performance Guide § “V. Talent Conversations”</td>
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<td></td>
<td>o Probationary and Talent Conversations</td>
<td>• October 31</td>
<td>• Performance Review Narrative</td>
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<td>o Interim Review (or Talent Conversation #3) – if employee is “not meeting” expectations ensure review is documented in NinerTalent by deadline</td>
<td>• w/in employees notice period</td>
<td>• Effective Talent Conversations</td>
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<td>• Transfer Reviews – if an employee or supervisor transfers to a new position or exits the university</td>
<td></td>
<td>• Forward Thinking and Planning</td>
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<td>* SHRA Performance Policy</td>
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3. **Hold Calibration Sessions**

- Ensure performance rating consistency in unit based on established standards
- Identify and clarify unit standards to be communicated in the upcoming cycle
- Ensure consistency in similar positions by standardizing:
  - Institutional goal weights (%)
  - Individual goal tasks and weights (%) if the same across positions

**Note!**
Will not be implemented until February 2018

February – March

- “Search” NinerTalent STAKES Guide
- See Performance Guide § “III. Calibration & Scoring”:
  - Calibration Guide

March 31 – Performance Cycle Ends

4. **Complete Performance Appraisal**

- Rate each institutional goal and individual goal as follows: (1) Not Meeting, (2) Meeting, (3) Exceeding
- Provide supporting documentation regarding performance in comments section if rate a 1 or 3

**Note!**
Process is not complete until appraisal meeting occurs and employee acknowledges plan

May 15

- “Search” NinerTalent STAKES Guide
- See Performance Guide § “III. Calibration & Scoring”:
  - Assigning a Score
  - Reviewer Bias

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**Institutional Goal and Individual Goal Scores**

- 3 = Exceeding Expectations A+
- 2 = Meeting Expectations A
- 1 = Not Meeting Expectations D

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When appraising performance – 1.) Rate goals  ➔ 2.) Get next-level approval  ➔ 3.) Meet w/employee to discuss  ➔ 4.) Have employee acknowledge