Succeeding through Teamwork, Active feedback, Knowledge transfer, Engagement, and Support

NinerTalent
STAKES
Developing a Performance Plan

1. Institutional Goals
2. Individual Goals
3. Career Development Goals
Institutional Goals

Success Tip! Use the given verbiage to help you communicate your expectations

EXPERTISE
- Precision
- Resourcing
- Innovation
- Development

ACCOUNTABILITY
- Productivity
- Autonomy
- Prioritizing
- Coordination

CUSTOMER-ORIENTED
- Clarity
- Awareness
- Attentiveness
- Diplomacy

TEAM-ORIENTED
- Collegiality
- Collaboration
- Contribution
- Attendance

COMPLIANCE & INTEGRITY
- Policy
- Safety
- Ethics
- Respect

SUPERVISION
- Oversight
- Goal-Setting
- Managing Talent
- Leading
Success Tip! Use the given verbiage to help you communicate your expectations

EXPERTISE

**Precision** - Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet requirements of the employee’s position and profession.

**Resourcing** - Makes efficient and appropriate use of materials and documents work appropriately.

**Innovation** - Looks for ways to improve efficiency or quality.

**Development** - Maintains technical skills and relevant professional credentials.

ACCOUNTABILITY

**Productivity** - Completes required volume of work by established deadlines and stays productive throughout workday.

**Autonomy** - Generally completes work with few reminders and/or infrequent oversight.

**Prioritizing** - Takes sufficient/appropriate measures to plan and organize work, prioritize tasks, and set realistic goals.

**Coordination** - Seeks needed information to complete work and timely communicates status with relevant parties.
### EXPERTISE

<table>
<thead>
<tr>
<th>NOT MEETING EXPECTATIONS</th>
<th>MEETING EXPECTATIONS</th>
<th>EXCEEDING EXPECTATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PRECISION</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Produces work lacking sufficient detail or analysis to meet the requirements of the position, or lacks the professional knowledge expected and necessary in the position.</td>
<td>• Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession.</td>
<td>• Produces work that shows strong attention to detail and thorough analysis. The employee is highly skilled in the profession and applies sound critical and creative thinking to address work issues.</td>
</tr>
<tr>
<td>• Errors are common and may require additional time and effort by employee or by others to correct. Mistakes are more visible to clients and may disrupt service.</td>
<td>• Errors are infrequent, are recognized prior to completion of project, and/or are corrected as soon as identified with little to no disruption of service.</td>
<td>• Errors are extremely rare. The employee has put methods in place to ensure independently that content is correct prior to completion of tasks.</td>
</tr>
<tr>
<td>• Shows little concern for any lack of quality in their work, and takes little or no initiative to correct deficiencies.</td>
<td>• Demonstrates pride in their work and accepts responsibility for assigned tasks.</td>
<td>• Personally seeks to add value in every work assignment.</td>
</tr>
<tr>
<td><strong>RESCOURING</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Generally, fails to maintain sufficient inventory, is inefficient or wasteful in use of resources, and/or makes mistakes requiring work to be redone, which may result in delays or additional costs.</td>
<td>• Makes efficient and appropriate use of materials, resulting in sufficient cost effectiveness and little to no waste of resources.</td>
<td>• Accurately anticipates resource requirements, even with complex projects, and proactively takes approved steps to minimize waste and sustain appropriate inventory while still delivering high-quality work.</td>
</tr>
<tr>
<td>• Necessary documentation of work is missing, incomplete, or is not readily understandable to others for effective use, or misrepresents work in documentation.</td>
<td>• Adheres to requirements for recordkeeping and documentation of work in a manner readily understandable to others and sufficient for effective use by self and others.</td>
<td>• Documentation is thorough, clear, and easily understandable to others for effective use, and also provides added detail that addresses nuances and exceptions not apparent to others.</td>
</tr>
</tbody>
</table>
### SHRA Institutional Goals / ITS Competencies Crosswalk

<table>
<thead>
<tr>
<th>EXPERTISE</th>
<th>CUSTOMER-ORIENTED</th>
<th>COMPLIANCE &amp; INTEGRITY</th>
<th>TEAM-ORIENTED</th>
<th>SUPERVISION</th>
</tr>
</thead>
</table>
| • Encourage Innovation  
  • Engage in Continuous Learning  
  • Identify & Solve Problems | • Focus on Customers  
  • Communicate Well  
  • Build Trusting Relationships | • Build Trusting Relationships (Integrity)  
  • *Compliance was not represented* | • Readily Adapt  
  • Communicate Well  
  • Work as a Team  
  • Build Trusting Relationships | • Lead Through Vision & Values  
  • Attract & Develop People |

**ACCOUNTABILITY**

• Take Initiative  
  • Plan & Organize Work  
  • Execute Thoroughly
SHRA Institutional Goals / ITS Competencies Crosswalk

**EXPERTISE**
- Precision
- Resourcing
- Innovation
- Development

**ACCOUNTABILITY**
- Productivity
- Autonomy
- Prioritizing
- Coordination

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- Clarity
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- Contribution
- Attendance

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SHRA Institutional Goals / ITS Competencies Crosswalk

COMPLIANCE & INTEGRITY
- Policy
- Safety
- Ethics
- Respect

SUPERVISION
- Oversight
- Goal-Setting
- Managing Talent
- Leading

COMPLIANCE & INTEGRITY
- Build Trusting Relationships (Integrity)
- Compliance was not represented

SUPERVISION
- Lead Through Vision & Values
- Attract & Develop People
EXPERTISE

Encourage Innovation - Generates innovative solutions; tries different and novel ways to deal with work problems, opportunities, and customer requirements.

Engage in Continuous Learning - Actively identifies new areas for learning; takes advantage of learning opportunities; applies newly gained knowledge and skill on the job.

Identify and Solve Problems - Uses data and information to identify issues; makes recommendations and decisions to resolve problems.

ACCOUNTABILITY

Take Initiative - Takes prompt action to begin and accomplish objectives; be proactive and take action to achieve goals beyond what is required.

Plan and Organize Work - Develop specific objectives and actions to ensure work is completed by self and others as required.

Execute Thoroughly - Sets challenging but realistic goals; demonstrates urgency to achieve successful outcomes.

Success Tip! Use the given verbiage to help you communicate your expectations
CUSTOMER-ORIENTED

Focus on Customers - Effectively anticipates, understands and meets customer needs; takes responsibility for customer satisfaction.

Communicate Well - Conveys information and ideas to individuals and groups to promote mutual understanding and gain acceptance.

Build Trusting Relationships - Interacting with others with integrity and honesty; being open to and considerate of others’ ideas.

TEAM-ORIENTED

Readily Adapt - Maintains effectiveness when experiencing major changes in work tasks or the work environment; works effectively within new work structures, processes, requirements, or cultures.

Communicate Well - Conveys information and ideas to individuals and groups to promote mutual understanding and gain acceptance.

Work as a Team - Actively participates and collaborates with others to promote cooperation and achieve goals.

Build Trusting Relationships - Interacting with others with integrity and honesty; being open to and considerate of others’ ideas.

Success Tip! Use the given verbiage to help you communicate your expectations
Build Trusting Relationships - Interacting with others with integrity and honesty; being open to and considerate of others’ ideas.

Compliance – *not represented in ITS competencies*

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Lead Through Vision & Values - Communicates and actively promotes the vision and values of the University and the IT organization.

Attract & Develop People - Identifies talent; provides regular feedback and coaching to strengthen specific knowledge/skill areas; promotes ongoing learning and development of others.
Institutional Goals

1. Expertise
2. Accountability
3. Customer-Oriented
4. Team-Oriented
5. Compliance & Integrity
6. Supervision (for supervisors only)

Three Rules to Institutional Goals:
1. Total weight of the institutional goals must equal 50%
2. Each goal must be weighted at least 5%
3. Weight the goals in accordance with its importance to the successful execution of the position.

Success Tip!
To keep goals clear in your mind, review them in three main parts. 1-2, 3-4, 5-6
Weighting Non-supervisory Positions

<table>
<thead>
<tr>
<th>DIFFERENT WAYS TO APPLY WEIGHTS TO INSTITUTIONAL GOALS</th>
<th>Position without weight adjustments</th>
<th>Position with high customer focus but with little decision making authority</th>
<th>Position requiring high attention to detail and strict rule enforcement</th>
<th>Position requiring heavy coordination within teams to complete projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXPERTISE</td>
<td>10%</td>
<td>5%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>ACCOUNTABILITY</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>CUSTOMER-ORIENTED</td>
<td>10%</td>
<td>20%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>TEAM-ORIENTED</td>
<td>10%</td>
<td>10%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>COMPLIANCE &amp; INTEGRITY</td>
<td>10%</td>
<td>5%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>
### NinerTalent - Plan Input

#### Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Due Date</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-2018 SHRA Annual Review for Norm Niner</td>
<td>Supervisor Appraisal</td>
<td>2017-05-07 Due in 3 months</td>
<td>Upcoming</td>
<td>View</td>
</tr>
<tr>
<td>2017-2018 SHRA Annual Review for Norm Niner</td>
<td>Performance Plan Creation</td>
<td>2017-01-05 Due 15 days ago</td>
<td>Overdue</td>
<td>View</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries
NinerTalent - Plan Input

**SHRA Annual Performance Review (2017-2018)**

<table>
<thead>
<tr>
<th>Evaluation Type:</th>
<th>Focal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Timeframe:</td>
<td>06/05/16 to -</td>
</tr>
<tr>
<td>Position Description:</td>
<td>Human Resources Manager</td>
</tr>
<tr>
<td>Supervisor:</td>
<td>Jeanne Madorin</td>
</tr>
<tr>
<td>Co-reviewer:</td>
<td>Add Co-reviewer</td>
</tr>
</tbody>
</table>

Review Status: Overdue
Last Updated: January 20, 2017 05:18

**Plan for Norm Niner**

The supervisor and employee create the performance plan together, setting goals for the coming year.

- **Schedule and Components**
- **Institutional Goals**
- **Individual Goals**
- **Career Development Plan**
- **Evaluation Method(s)**

The institutional goals in the performance plan define campus-wide performance expectations for all SHRA employees. These goals address a wide range of performance expectations found in all aspects of the employee's work product (quality, accuracy, timeliness, manner of delivery, policy compliance, etc.) as well as standard expectations for employee behavior and conduct. UNC General Administration sets the institutional goals for all SHRA employees.
NinerTalent - Plan Input

Goal Definitions

**Expertise**

- Precision: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee's position and profession.
- Resourcing: Makes efficient and appropriate use of materials.
- Innovation: Continuously looks for ways to improve efficiency or quality.
- Development: Maintains technical skills and relevant professional credentials.

**Accountability**

- Productivity: Completes required volume of work by established deadlines and stays productive.
- Autonomy: Generally completes work with few reminders or infrequent oversight.
- Prioritizing: Takes sufficient and appropriate measures to plan work, prioritize tasks, complete work efficiently.
- Coordination: Proactively seeks out needed information in order to complete work.

**Comments and/or Improvement Plan**

- Add any (SOPs) you feel are necessary to document for employee
  - Including ITS competencies if desired
- Note any improvement expectations from previous appraisal
3-5 Individual Goals

- Critical Function Goals
- Project-Oriented Goals
- Forward-Focused Goals
Individual “SMART-ER” Goals

<table>
<thead>
<tr>
<th>S</th>
<th>Specific</th>
<th>• What needs to be accomplished? What outcomes?</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Measureable</td>
<td>• What data can be used to define success?</td>
</tr>
<tr>
<td>A</td>
<td>Achievable</td>
<td>• Is this challenging but realistic?</td>
</tr>
<tr>
<td>R</td>
<td>Relevant</td>
<td>• Does this align with broader goals/needs?</td>
</tr>
<tr>
<td>T</td>
<td>Time-bound</td>
<td>• What are the deadlines/milestones?</td>
</tr>
<tr>
<td>E</td>
<td>Expectations</td>
<td>• Is it ethical and enjoyable? Is the energy sustainable?</td>
</tr>
<tr>
<td>R</td>
<td>Resources</td>
<td>• What assistance (resources) will be provided for this?</td>
</tr>
</tbody>
</table>
Three things to keep in mind while preparing SMART-ER goals:

• 1. The Goal Itself

• 2. The Specific Deliverables

• 3. What “Exceeding Expectations” looks like.
Individual “SMART-ER” Goals

• **Goal**: Present the new PM plan to all SHRA supervisors before April 1, 2017 in order to provide sufficient guidance to supervisors on new program so that they will be ready to develop performance plans in 2017.

• **Specific Deliverables**: 1. Develop a PowerPoint presentation to be used by all involved. 2. Determine what handout materials are needed.

• **Exceeding Expectations**: Not only present new PM plan to all supervisors face-to-face but develop online Skillport training based off of face-to-face presentation material as well.
Individual “SMART-ER” Goals

NinerTalent STAKES Performance Program Participation

Become familiar with campus’s new Performance Program in order successfully implement the new program and help your employee succeed.

- Attend supervisory training and review Performance Guides for clarity
- Schedule three talent conversations for the transition cycle
- Assist in the completion of your Performance Plan by May 15
- Regularly document and discuss your efforts, successes, and challenges within your role to be more prepared for each talent conversation

Exceeding expectations may include attending all available Performance training workshops and programs (including e-learning; serving as a model and enthusiast of the NinerTalent Performance program within your unit; taking a consistently proactive approach by preparing ideas, materials and resources for each talent conversation.)
Individual “SMART-ER” Goals

Wording to Get You Started – Individual Goals

(VERB) (NOUN) by (DATE) in order to (OUTPUT)

For example:

- Attend **NinerTalent STAKES Training** by **HR deadline** and apply **your new skills** in order to **successfully implement the new program**.

- Deliver **mail** by **10am & 3pm daily** in order to **ensure departmental staff receive information on a timely basis**.

- Actively participate in **two-way quarterly conversations** by **July 2017, Oct. 2017, Jan. 2017, and Apr. 2018** in order to **ensure your employee and your department meet the goals for this cycle**.

**JUST FILL IN THE BLANKS!**
NinerTalent - Plan Input

Individual Goals

**Goal Name**

* Goal Name
SHRA Performance Appraisal Policy Training

**Goal Description**

- SMART-ER Goal
- Deliverables
- Exceeding Expectations

Present the new PM plan to all SHRA supervisors before April 1, 2017 in order to provide sufficient guidance to supervisors so that they will be ready to develop performance plans in 2017.

Specific Deliverable:
1. Develop a PowerPoint presentation to be used by all involved.
2. Determine what handout materials are needed.

Exceeding Expectations: Not only present new PM plan to all supervisors face-to-face but develop online Skillport training based off of face-to-face presentation material as well.

**Enter Goal % “Weight”**

30

[Add Entry]
Career Development Goals

- Experience
- Growth
- Continuing Ed
- Mentorship
WHAT TO REMEMBER

• Be able to explain how the institutional goals relate to the duties in the position description
  • Include ITS Competencies

• Ensure individual goals connect to your strategic goals for the cycle
  • Make them SMARTER

• Weight goals in accordance of importance to job execution and identify standards of performance

• Create at least one career development goal to help employee maintain or gain skills or knowledge
NinerTalent STAKES

Succeeding through Teamwork, Active feedback, Knowledge transfer, Engagement, and Support