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

NinerTalent STAKES
NinerTalent STAKES Program

Program Philosophy

Effectively communicating to engage our workforce and encourage individual, unit, and University success.

- **Succeeding through**
  - Meeting/Exceeding the business needs of the University & career goals

- **Team-work**
  - Working together as a community to achieve our objectives

- **Active feedback**
  - Ongoing clear and effective two-way communication on job expectations

- **Knowledge transfer**
  - Preparing employees for future opportunities (Succession planning)

- **Engagement**
  - Interactions that reinforce each individual’s contribution to mission & goals

- **Support**
  - Assisting and encouraging individuals to accomplish their goals
Today’s Agenda

Key Elements in SHRA Performance Appraisal Policy
- Cycle
- Performance Plan
- Off-Cycle Reviews
- Performance Appraisals
- Calibration

NinerTalent STAKES Program
- Talent Conversations
- Timeline
- Roles and Responsibilities

Developing Performance Plan
- Institutional Goals
- Individual Goals
- Career Development Goals

Things to Note
SHRA PERFORMANCE POLICY

Cycle
Performance Plan
Off-Cycle Reviews
Ratings
Calibration
- Make process clearer and less cumbersome
  - Simplify process by standardizing evaluation criteria

- Increase performance goal & rating consistency
  - Standardizing performance categories

- Increase accuracy and defensibility of ratings
  - Address both job performance and conduct

- Promote honest and clear communication
KEY ELEMENTS OF POLICY

- **Cycle**
- **Performance Plan**
- **Off-Cycle Reviews**
- **Ratings**
- **Calibration**

**Annual Cycle**

*April 1st – March 31st*

(formerly March 1 – February 28/29)

**State Deadline**

Performance Plan & Appraisals Due

*May 30th*
5 Institutional Goals (Standard)
(6 for supervisors)

- COMPLIANCE & INTEGRITY
- ACCOUNTABILITY
- EXPERTISE
- CUSTOMER-ORIENTED
- TEAM-ORIENTED

+ SUPERVISION

3-5 Individual Goals
(specific tasks)

- GOAL #1
- GOAL #2
- GOAL #3
- GOAL #4
- GOAL #5
Institutional Goals

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

**CUSTOMER-ORIENTED**
- Clarity
- Awareness
- Attentiveness
- Diplomacy

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

**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.
5 Institutional Goals (Standard)
(6 for supervisors)

- COMPLIANCE & INTEGRITY
- ACCOUNTABILITY
- EXPERTISE
- CUSTOMER-ORIENTED
- TEAM-ORIENTED

3-5 Individual Goals
(specific tasks)

- GOAL #1
- GOAL #2
- GOAL #3
- GOAL #4
- GOAL #5
KEY ELEMENTS OF POLICY

Weighted Goals

Institutional Goals
- 10% COMPLIANCE & INTEGRITY
- 10% ACCOUNTABILITY
- 15% CUSTOMER-ORIENTED
- 5% TEAM-ORIENTED

50%

Individual Goals
- 15% GOAL #1
- 10% GOAL #2
- 10% GOAL #3
- 10% GOAL #4
- 5% GOAL #5

50%

Cycle
Performance Plan
Off-Cycle Reviews
Ratings
Calibration
Performance Plan

Approver’s Workflow

Next Level Supervisor Review - ensure goal alignment and consistency across similar positions
KEY ELEMENTS OF POLICY

Cycle

Performance Plan

Off-Cycle Reviews

Ratings

Calibration

Prohibitionary Reviews

Completed quarterly

Interim Reviews

Completed mid-cycle (~October)

Required if...

Transfer Reviews

Completed when supervisor or employee transfers

Employee Requested

• Employee can request once a cycle

• Must be at least 60 days after last review
Welcome to the Employee Portal, Norm Niner

Your Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Due Date</th>
<th>Status</th>
<th>Action</th>
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<tr>
<td>2016-2017 SHRA Annual Performance Review for Harry Potter</td>
<td>Employee Self Assessment/Comments</td>
<td>2017-03-15</td>
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<td>View</td>
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<td>Off Cycle Review Harry Potter</td>
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</table>

Showing 1 to 5 of 5 entries
KEY ELEMENTS OF POLICY

- **Cycle**
- **Performance Plan**
- **Off-Cycle Reviews**
- **Ratings**
- **Calibration**

**Appraisal Criteria**

- **Review Date**: 10/31/2017
- **Off-Cycle Review Type**: Probationary
- **Current Performance Status**: Not Meeting Expectations

**Comments**

- Employee needs to improve his skills in the areas of Expertise and Customer-Oriented. He is often not attentive to the needs of the customer and after being in his position for 6 months is still not knowledgeable of general office policies/procedures or where to locate them. Also, he is not familiar enough with the units within Human Resources to correctly direct customers.

- By the next quarter review the employee needs to become familiar with the policies, procedures, and processes of the department. In order to assist in gaining this knowledge I expect the following to be completed:
  - Review of specific Policies and PIMs assigned by supervisor
  - Meet with unit representatives to understand their role and how that aligns with customer needs
  - Take Skillsoft training on effective Customer Service and meet the "Customer-Oriented" goal by addressing customers in a timely manner (i.e. when they enter the office, when the phone rings, return email/voicemail ASAP if possible but no later than 24 hours.)

**Add new event “Add Entry”**

- Comments
- Issues/areas for improvement
- Deliverables to aid in improvement
**Institutional Goal and Individual Goal Scores**

3 = Exceeding Expectations  \( A^+ \)
2 = Meeting Expectations  \( A \)
1 = Not Meeting Expectations  \( D \)

**Final Overall Rating**

2.70 to 3.00 = Exceeding Expectations
1.70 to 2.69 = Meeting Expectations
1.00 to 1.69 = Not Meeting Expectations
###KEY ELEMENTS OF POLICY

####Scoring

<table>
<thead>
<tr>
<th>INSTITUTIONAL</th>
<th>Weight</th>
<th>x Rating</th>
<th>= Score</th>
<th>INDIVIDUAL</th>
<th>Weight</th>
<th>x Rating</th>
<th>= Score</th>
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<tbody>
<tr>
<td>Expertise</td>
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<td>3</td>
<td>0.30</td>
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<td>25%</td>
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<td>3</td>
<td>0.15</td>
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<tr>
<td>Compliance &amp; Integrity</td>
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<td>0.20</td>
<td>Goal 5</td>
<td>5%</td>
<td>3</td>
<td>0.15</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>50%</strong></td>
<td><strong>TOTAL</strong></td>
<td><strong>1.30</strong></td>
<td><strong>TOTAL</strong></td>
<td><strong>50%</strong></td>
<td><strong>TOTAL</strong></td>
<td><strong>1.10</strong></td>
</tr>
</tbody>
</table>

**Overall Score:** 1.30 + 1.10 = 2.40

Meeting Expectations
Institutional Goal and Individual Goal Scores

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

Final Overall Rating

2.70 to 3.00 = Exceeding Expectations
1.70 to 2.69 = Meeting Expectations
1.00 to 1.69 = Not Meeting Expectations
Things to note:

1. Overall Score ≠ “exceeding expectations” if employee:
   • was disciplined in current cycle or
   • has any appraisal rating of “not meeting expectations”

2. Any rating ± “meets expectations” must be supported by specific examples

3. Weighting should not be changed at or near the end of a performance cycle unless due to significant extenuating circumstances
Performance Appraisal

Approver’s Workflow

- Employee Completes Self-Appraisal
- Supervisor Completes Appraisal
- Next Level Supervisor/Mgr. Approves Appraisal
- Appraisal Review Meeting with Employee
- Employee Acknowledges Appraisal

Next Level Supervisor Review - ensure ratings comply with policy and are consistent across similar positions.
KEY ELEMENTS OF POLICY

Calibration

Establish goals and metrics to ensure consistent application of performance expectations and ratings across similar positions.
### Key Elements of Policy

#### Calibration of Performance Goals & Ratings

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<thead>
<tr>
<th>Not Meeting</th>
<th>Meeting</th>
<th>Exceeding</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
</tr>
<tr>
<td>On-Time</td>
<td>In Early Leaves Late</td>
<td>5 min. late</td>
</tr>
</tbody>
</table>

**React**

**Proactive**
**KEY ELEMENTS OF POLICY**

<table>
<thead>
<tr>
<th>Cycle</th>
<th>Performance Plan</th>
<th>Off-Cycle Reviews</th>
<th>Ratings</th>
<th>Calibration</th>
</tr>
</thead>
</table>

**Calibration of Performance Ratings**

<table>
<thead>
<tr>
<th>Not Meeting</th>
<th>Meeting</th>
<th>Exceeding</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**A**
On-Time

**B**
In Early Leaves Late

**C**
5 min. late

**REACTIVE**

**PROACTIVE**
**KEY ELEMENTS OF POLICY**

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<th>Cycle</th>
<th>Performance Plan</th>
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<th>Ratings</th>
<th>Calibration</th>
</tr>
</thead>
</table>

**“Meeting Expectations”**

Are there any standards of performance across job groups that you want to define?

- Institutional Goals (%)
- Individual Goals – tasks & (%)

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The image contains a pressure gauge labeled with numerical values, indicating a measurement or monitoring aspect related to performance. The content suggests the importance of setting and reviewing standards for institutional and individual goals in a performance evaluation context.
### Calibration of Performance Goals

<table>
<thead>
<tr>
<th>Not Meeting</th>
<th>Meeting</th>
<th>Exceeding</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>Expertise 20%</td>
<td>20%</td>
</tr>
<tr>
<td></td>
<td>Accountability 10%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Customer-Oriented 10%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>Team-Oriented 5%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>Compliance &amp; Integrity 5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Cycle**

- **Performance Plan**
- **Off-Cycle Reviews**
- **Ratings**
- **Calibration**

**Key Elements of Policy**

- **Performance Plan**
- **Cycle**
- **Calibration of Performance Goals**
  - Reactivity
  - Proactivity

**20%**

- Expertise
- Accountability
- Customer-Oriented
- Team-Oriented
- Compliance & Integrity
# WHAT TO REMEMBER

<table>
<thead>
<tr>
<th>Cycle</th>
<th>Performance Plans</th>
<th>Off-Cycle Reviews</th>
<th>Ratings</th>
<th>Calibration</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

## OLD CYCLE (2016-2017)

- **March 1 – Feb 28/29**
- **Work Plan**
  - Job Duty – SMART Goals
  - Behavioral Goals
- **Prioritized Job Duties**
- **N/A**
- **Required**
  - Probationary
- **Recommended/requested**
  - Interim, Transfer/Exit
- **5 Ratings**
- **Customary stop**
- **None required**

## NEW CYCLE (2017-2018)

- **April 1 – March 31**
- **Performance Plan**
  - Institutional Goals (50%)
  - Individual Goals (50%)
- **Weighted Goals (%)**
- **Next-Level Review (consistency)**
- **Probationary (quarterly), Interim (mid-cycle)**
- **Transfer (employee or superv.)**
- **Employee (60 days of last rev.)**
- **3 Ratings**
- **Next-Level Review (consistency & score compliance)**
- **Performance Goals**
- **Performance Appraisals**

## Off-Cycle Reviews

- **Probationary (quarterly), Interim (mid-cycle)**
- **Transfer (employee or superv.)**
- **Employee (60 days of last rev.)**

## Ratings

- **5 Ratings**
- **Customary stop**
- **None required**

## Calibration

- **None required**
NinerTalent STAKES Program

1. Talent Conversations
2. Timeline
3. Roles & Responsibilities
A Shift to Talent Conversations

**PAST**
One-way, one-time Lecture with 75% focused on the past
(Around performance appraisal time)

**FUTURE**
2-way talent conversation with a 50/50 time split on the past and future
(At least 4 per year)
A Shift to Talent Conversations

Remember!
You’re not just a supervisor...
You’re a Coach
A Shift to Talent Conversations

**When Should You be Coaching?**

1. *When employee is looking or has the potential to develop professionally.*

2. *When employee is looking or needing to make improvements in their performance.*

3. *When employee needs to talk through a specific situation at work.*
A Shift to Talent Conversations

How can I deliver feedback in an effective way?

“Delivering Feedback”

Skillport Training Video
NinerTalent STAKES Cycle
Annual Timeline

TALENT CONVERSATION #1
March-April
Conduct Annual Performance Appraisal*,
Discuss Performance Plan for upcoming cycle
Schedule three follow-up talent conversations

Annual Appraisals & Performance Plan
Plan Due May 15

CALIBRATION SESSIONS
February
Leadership teams should hold calibration
sessions to ensure consistent performance
ratings & goal standards

TALENT CONVERSATION #4
December-January
Conduct nine-month follow-up to discuss goals,
assess progress and resources, and, if needed, clarify
or redefine expectations for remainder of cycle

Interim Appraisal Completed by October 31

TALENT CONVERSATION #2
June-July
Conduct three-month follow-up to discuss goals,
assess progress and resources, and, if needed, clarify
or redefine expectations for remainder of cycle

TALENT CONVERSATION #3
September-October
Conduct six-month follow-up** to discuss goals,
assess progress and resources, and, if needed, clarify
or redefine expectations for remainder of cycle
February
Leaders ensure consistent performance ratings & goal standards

Define “Need” (Meets) vs. “Want” (Exceeds)
NinerTalent STAKES Timeline

Talent Conversation #1
(The end and the beginning)

March-April

Conduct Annual Performance Appraisal

Discuss Performance Plan for Upcoming Cycle

Finalize document through NinerTalent by established due dates
NinerTalent STAKES Timeline

Talent Conversation #2
(3-month follow-up)

June-July

Check-in

Discuss goals, assess progress and resources

If needed clarify or redefine expectations for remainder of cycle

Plan Due
May 15

TALENT CONVERSATION #2
June-July
Conduct three-month follow-up to discuss goals, assess progress and resources, and, if needed, clarify or redefine expectations for remainder of cycle
September-October

Conduct Interim Performance Review

Let employee know where they are in terms of meeting goals and expectations

Detailed documentation required for some employees
Talent Conversation #4

December-January

Final conversation prior to appraisal

Is the employee on track?

Begin to discuss goals for upcoming cycle

Has position changed?
Roles & Responsibilities

Next-Level Supervisor
- Ensure supervisors are aware of unit goals
- Review perf. plans & evals - ensure goals align & ratings are consistent/compliant

Supervisor
- Clarity in expectations & Honesty in appraisal (consistency across unit)
- Timely feedback & use of available resources to help employee succeed

Employee
- Actively participate & own the work
- Ask questions & keep supervisor informed
Roles & Responsibilities
In NinerTalent

Performance Plan
- Supervisor and Employee Create Performance Plan
- Next Level Supervisor/Mgr. Approves Appraisal
- Performance Plan Review Meeting with Employee
- Employee Acknowledges Plan

Performance Appraisal
- Employee Completes Self-Appraisal
- Supervisor Completes Appraisal
- Next Level Supervisor/Mgr. Approves Appraisal
- Appraisal Review Meeting with Employee
- Employee Acknowledges Appraisal

Note: Some of these actions may occur concurrently.
WHAT TO REMEMBER

• Continuous and effective two-way communication is key to employee & unit success

• Talent Conversations are not only for those employees who are “not meeting expectations”

• Strive to have at least 4 Talent Conversations with your employee each cycle

• Encourage your employee to participate in the process and ensure consistency in goals & ratings
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

COMPLIANCE & INTEGRITY
- Policy
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- Respect

TEAM-ORIENTED
- Collegiality
- Collaboration
- Contribution
- Attendance

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

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

## 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><strong>PRECISION</strong></td>
<td><strong>PRECISION</strong></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>RESOURCING</strong></td>
<td><strong>RESOURCING</strong></td>
<td><strong>RESOURCING</strong></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>
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 it’s 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>
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<tbody>
<tr>
<td>EXPERTISE</td>
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<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>
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<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>
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<tr>
<td>COMPLIANCE &amp; INTEGRITY</td>
<td>10%</td>
<td>5%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>TOTAL</td>
<td><strong>50%</strong></td>
<td><strong>50%</strong></td>
<td><strong>50%</strong></td>
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</tr>
</tbody>
</table>
# NinerTalent - Plan Input

## Your Action Items

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<tr>
<td>2017-2018 SHRA Annual Review for Norm Niner</td>
<td>Performance Plan Creation</td>
<td>2017-01-05</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)

Evaluation Type: Focal
Program Timeframe: 06/05/16 -
Position Description: Human Resources Manager
Supervisor: Jeanne Madorin
Co-reviewer: Add Co-reviewer

Review Status:
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.

**Comments and/or Improvement Plan**
- Add any (SOPs) you feel are necessary to document for employee
- Note any improvement expectations from previous appraisal

**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, utilizes work flows, and set realistic goals.
- Coordination: Proactively seeks out needed information in order to complete work.

**Comments and/or Performance Improvement Plans**
- EXAMPLE: Returns customer calls/emails within 24 hours
- EXAMPLE: Incurs no more than 2 data entry errors a semester
3-5 Individual Goals

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

<table>
<thead>
<tr>
<th>Specific</th>
<th>What needs to be accomplished? What outcomes?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measureable</td>
<td>What data can be used to define success?</td>
</tr>
<tr>
<td>Achievable</td>
<td>Is this challenging but realistic?</td>
</tr>
<tr>
<td>Relevant</td>
<td>Does this align with broader goals/needs?</td>
</tr>
<tr>
<td>Time-bound</td>
<td>What are the deadlines/milestones?</td>
</tr>
<tr>
<td>Expectations</td>
<td>Is it ethical and enjoyable? Is the energy sustainable?</td>
</tr>
<tr>
<td>Resources</td>
<td>What assistance (resources) will be provided for this?</td>
</tr>
</tbody>
</table>
Individual “SMART-ER” Goals

• 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

**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 HR's and 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
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

• 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
Things to Note

- Review NinerTalent STAKES Tools & Resources
- NinerTalent & Goal Setting Workshop
- Performance Appraisals Due (Old Policy)
- Performance Plans Due (New Policy)
- Questions on new policy or program?

- Available now at hr.uncc.edu/performance/new
- April 2017
  - See above website (under Training)
- April 28, 2017
- May 15, 2017
- Paulette Russell x.70660 or P.Douglas@uncc.edu
NinerTalent
STAKES

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