





# Performance Process - Quick Reference Guide

| Process                                   | Procedure  | Deadline  | Reference Guides  |
|---|--|---|---|
| <b>April 1 – Performance Cycle Begins</b> |  |   |   |
| <b>1. Establish Performance Plan</b><br>  | <b>Institutional Goals (5 standard or 6 for supervisors)</b> <ul style="list-style-type: none"> <li>Familiarize yourself with the each institutional goal and the “meeting expectations” standard for each goal</li> <li>Identify any specific SOPs that correlate with each goal and document if necessary</li> <li>Assign a weight of no less than 5% for each goal based on its importance to the position</li> <li>Make sure all of the institutional goals add up to 50%</li> </ul> |   | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “IV. Goals” :<br><a href="#">Institutional Goals</a><br><br>Under NTS Performance Tools click<br><a href="#">SHRA Institutional Goals Expanded</a><br><br>* <a href="#">SHRA Performance Policy</a> |
|   | <b>Individual Goals (3-5 tasks)</b> <ul style="list-style-type: none"> <li>Identify what the strategic goals are for your unit this cycle</li> <li>Develop 3-5 SMARTER goals by determining any critical tasks or projects to be completed this cycle – should align with strategic goals</li> <li>Assign a weight of no less than 5% for each individual goal based on its importance to the position</li> <li>Make sure all of the individual goals add up to 50%</li> </ul>           | <b>May 15</b><br><br><i>Note!</i><br>Process is not complete until plan meeting occurs and employee acknowledges plan | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “IV. Goals”:<br><a href="#">Individual Goals</a><br><br>Sample performance documents can be found under the “NTS Performance Tools”<br><br>* <a href="#">SHRA Performance Policy</a>                |
|   | <b>Career Development Goals</b> <ul style="list-style-type: none"> <li>Document at least one career goal for this cycle to help gain or maintain knowledge, skills or abilities</li> </ul>   |   | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “IV. Goals”:<br><a href="#">Career Development Plan</a>   |

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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| <b>2. Conduct Off-Cycle Reviews</b>    | <ul style="list-style-type: none"> <li>Let your employee know how he/she is doing at this point in the cycle.</li> <li>Provide brief documentation about review in NinerTalent.               <ul style="list-style-type: none"> <li>Probationary and Talent Conversations</li> <li>Interim Review (or Talent Conversation #3) – if employee is “not meeting” expectations ensure review is documented in NinerTalent by deadline</li> </ul> </li> <li>Transfer Reviews – if an employee or supervisor transfers to a new position or exits the university</li> </ul> | <ul style="list-style-type: none"> <li>Throughout cycle</li> <li>April, July, October, January</li> <li>October 31</li> <li>w/in employees notice period</li> </ul> | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “V. Talent Conversations” <ul style="list-style-type: none"> <li><a href="#">Performance Review Narrative</a></li> <li><a href="#">Effective Talent Conversations</a></li> <li><a href="#">Forward Thinking and Planning</a></li> </ul> * <a href="#">SHRA Performance Policy</a> |
| <b>3. Hold Calibration Sessions</b>   | <ul style="list-style-type: none"> <li>Ensure performance rating consistency in unit based on established standards</li> <li>Identify and clarify unit standards to be communicated in the upcoming cycle</li> <li>Ensure consistency in similar positions by standardizing:               <ul style="list-style-type: none"> <li>Institutional goal weights (%)</li> <li>Individual goal tasks and weights (%) if the same across positions</li> </ul> </li> </ul>   | February – March<br><br><b>Note!</b><br>Will not be implemented until February 2018   | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “III. Calibration & Scoring”:<br><a href="#">Calibration Sessions</a><br><br>Under “NTS Perf. Tools”<br><a href="#">Calibration Guide</a>   |
| <b>March 31 – Performance Cycle Ends</b>  |   |   |   |
| <b>4. Complete Performance Appraisal</b> <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;"> <b>Institutional Goal and Individual Goal Scores</b><br/>           3 = Exceeding Expectations <b>A+</b><br/>           2 = Meeting Expectations <b>A</b><br/>           1 = Not Meeting Expectations <b>D</b> </div> | <ul style="list-style-type: none"> <li>Rate each institutional goal and individual goal as follows: (1) Not Meeting, (2) Meeting, (3) Exceeding</li> <li>Provide supporting documentation regarding performance in comments section if rate a 1 or 3</li> </ul>   | <b>May 15</b><br><br><b>Note!</b><br>Process is not complete until appraisal meeting occurs and employee acknowledges plan  | “Search”<br><a href="#">NinerTalent STAKES Guide</a><br><br>See Performance Guide § “III. Calibration & Scoring”:<br><ul style="list-style-type: none"> <li><a href="#">Assigning a Score</a></li> <li><a href="#">Reviewer Bias</a></li> </ul>   |

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