<table>
<thead>
<tr>
<th>Process</th>
<th>Procedure</th>
<th>Deadline</th>
<th>Reference Guides</th>
</tr>
</thead>
</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% | May 15  
**Note!**  
Process is not complete until plan meeting occurs and employee acknowledges plan | “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% | | “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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</table>
| 2. Conduct **Off-Cycle Reviews** | • Let your employee know how he/she is doing at this point in the cycle.  
• Provide brief documentation about review in NinerTalent.  
  o Probationary and Talent Conversations  
  o Interim Review (or Talent Conversation #3) – if employee is “not meeting” expectations ensure review is documented in NinerTalent by deadline  
• Transfer Reviews – if an employee or supervisor transfers to a new position or exits the university | Throughout cycle  
April, July, October, January  
October 31  
w/in employees notice period | “Search”  
NinerTalent STAKES Guide  
See Performance Guide § “V. Talent Conversations”  
• Performance Review Narrative  
• Effective Talent Conversations  
• Forward Thinking and Planning  
* SHRA Performance Policy |
| 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:  
  o Institutional goal weights (%)  
  o Individual goal tasks and weights (%) if the same across positions | February – March  
**Note!**  
Will not be implemented until February 2018 | “Search”  
NinerTalent STAKES Guide  
See Performance Guide § “III. Calibration & Scoring”:  
Calibration Sessions  
| 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 | May 15 | “Search”  
NinerTalent STAKES Guide  
See Performance Guide § “III. Calibration & Scoring”:  
• Assigning a Score  
• Reviewer Bias |

### Institutional Goal and Individual Goal Scores

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Exceeding Expectations A+</td>
</tr>
<tr>
<td>2</td>
<td>Meeting Expectations A</td>
</tr>
<tr>
<td>1</td>
<td>Not Meeting Expectations D</td>
</tr>
</tbody>
</table>

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

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

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

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