# Performance Process - Quick Reference Guide

<table>
<thead>
<tr>
<th>Process</th>
<th>Procedure</th>
<th>Deadline</th>
<th>Reference Guides</th>
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<tbody>
<tr>
<td><strong>April 1 – Performance Cycle Begins</strong></td>
<td><strong>1. Establish Performance Plan</strong></td>
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<td>Institutional Goals (5 standard or 6 for supervisors)</td>
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<td>• Familiarize yourself with the each institutional goal and the “meeting expectations” standard for each goal</td>
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<td>• Identify any specific SOPs that correlate with each goal and document if necessary*</td>
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<td>• Assign a weight of no less than 5 for each goal based on its importance to the position*</td>
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<td></td>
<td>• Make sure all of the institutional goals add up to 50</td>
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<td>*See Tip 1 under Reference Guides</td>
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<td><strong>Individual Goals (3-5 tasks)</strong></td>
<td>May 15</td>
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<td>• Identify what the strategic goals are for your unit this cycle</td>
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<td>• Develop 3-5 SMARTER goals by determining any critical tasks or projects to be completed this cycle – should align with strategic goals</td>
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<td>• Assign a weight of no less than 5 for each individual goal based on its importance to the position</td>
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<td>• Make sure all of the individual goals add up to 50</td>
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<td>*See Tip 2 under Reference Guides</td>
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<td><strong>Career Development Goals</strong></td>
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<td>• Document at least one career goal for this cycle to help gain or maintain knowledge, skills or abilities</td>
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<td>*See Tip 2 under Reference Guides</td>
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When establishing plan – 1.) Set goals  ➔ 2.) Get next-level approval ➔ 3.) Meet w/employee to clarify goals ➔ 4.) Have employee acknowledge plan

*See Tip 1 under Reference Guides

**Tip:**
1. Previous performance plan may be useful if goal will not change
2. Use the employee self-appraisal from the previous cycle to help you create individual goals and career development activities for your employee’s plan.

Use Employee Portal QRG to help you access docs in NinerTalent

“Search” NinerTalent STAKES Guide
See Performance Guide § “IV. Goals”:
- Institutional Goals
  - SHRA Institutional Goals Expanded
- Individual Goals
  - Sample goals - STAKES website
- Career Development Plan

Note!
Process is not complete until plan meeting occurs and employee acknowledges plan
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| 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  
  o Ensure consistency in similar positions by standardizing goals for positions that are the same or substantially similar | February – March  
**Note!**  
Will not be implemented until February 2018 | See NTS Guide - Performance Guide § “III. Calibration & Scoring”  
• Calibration Sessions  
Calibration Guide & video  
Calibration Discussion - QRG |
| 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  
• Review employee self-appraisal to see how employee | May 15  
**Note!**  
Process is not complete until appraisal meeting occurs and employee acknowledges plan | “Search”  
NinerTalent STAKES Guide  
• Assigning a Score  
• Reviewer Bias  

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