

ANNUAL CYCLE	<ul style="list-style-type: none"> • April 1 to March 31 • Implementation: Go Live April 1, 2017
3-POINT RATING SCALE	<ul style="list-style-type: none"> • Exceeding Expectations • Meeting Expectations • Not Meeting Expectations
PERFORMANCE PLAN	<ul style="list-style-type: none"> • Complete between April 1 and May 30 • Set Institutional Goals (50% of overall rating) • Set Individual Goals (50% of overall rating) • Set Talent Development Goals (not rated at end of cycle)
INSTITUTIONAL GOALS	<ul style="list-style-type: none"> • Set by UNC General Administration for all SHRA employees <ul style="list-style-type: none"> ◦ Five goals for all employees: Expertise, Accountability, Customer-Oriented, Team-Oriented, Compliance & Ethics ◦ One additional goal for supervisors: Supervision • Supervisors <u>cannot</u> change the content of these goals • Supervisors rate the totality of an employee’s work against these goals
INDIVIDUAL GOALS	<ul style="list-style-type: none"> • 3-5 strategic goals written by supervisor for each employee for this cycle • Not meant to cover the totality of the employee’s work • Intended to align with critical business needs and the University’s strategic goals
CALIBRATION	<ul style="list-style-type: none"> • Peer supervisors in a work unit meet at <u>beginning</u> of cycle to set expectations for employees in similar positions • Peer supervisors in a work unit meet at the <u>end</u> of the cycle to set consistency of ratings for employees in similar positions
OFF-CYCLE REVIEWS	<ul style="list-style-type: none"> • Types: interim, probationary, transfer, management-driven, employee-requested • Not a full appraisal (no ratings); generally a few paragraphs • Interim reviews only required if: <ul style="list-style-type: none"> ◦ Employee received any rating of “Not Meeting Expectations” on last annual appraisal ◦ Employees has active disciplinary actions ◦ Supervisor chooses to conduct interim reviews ◦ Chancellor (or designee) requires interim reviews campus-wide • Probationary reviews are required quarterly for probationary/time-limited employees • Employees can request one additional off-cycle review if it has been at least 60 calendar days since their last evaluation
ANNUAL APPRAISAL	<ul style="list-style-type: none"> • Complete between April 1 and May 30 • Supervisor rates each institutional and individual goal to determine overall rating • Comments clarify ratings for performance that does not meet or exceeds expectations • Employees who received disciplinary actions during performance cycle and/or who have any rating of “Not Meeting Expectations” cannot receive overall rating of “Exceeding Expectations”
SECOND-LEVEL REVIEW	<ul style="list-style-type: none"> • The second-level supervisor of the employee is required to review the performance plan and annual appraisal before they are issued to the employee
FORMS	<ul style="list-style-type: none"> • UNC General Administration provides a paper version of the appraisal form • Evaluating online tools
EHRA EMPLOYEES	<ul style="list-style-type: none"> • UNC General Administration provides an optional EHRA evaluation form that complements the SHRA form. Institutions are not required to use the optional EHRA form.