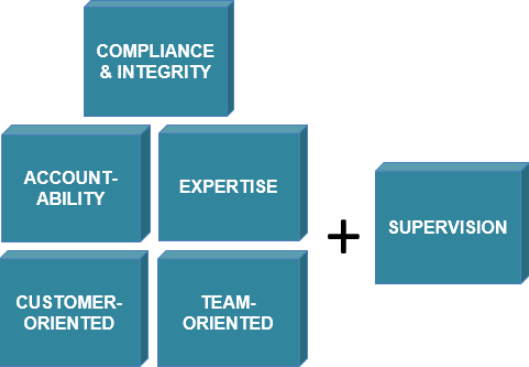






Performance Process – Quick Reference Guide

Process	Procedure	Deadline	Reference Guides	
April 1 – Performance Cycle Begins				
<p>1. Establish Performance Plan</p> 	<p>Institutional Goals (5 standard or 6 for supervisors)</p> <ul style="list-style-type: none"> Familiarize yourself with 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 the institutional goals add up to 50 <p><i>*See Tip 1 under Reference Guides</i></p>	<p>May TBD</p> <p><i>Note!</i> Process is not complete until plan meeting occurs and employee acknowledges plan</p>	<p>“Search” SHRA Performance Guide</p> <p>See Performance Guide § “IV. Goals” :</p> <ul style="list-style-type: none"> Institutional Goals <ul style="list-style-type: none"> SHRA Institutional Goals Expanded Individual Goals <ul style="list-style-type: none"> Sample goals – NT-STAKES website Career Development Plan <p>SHRA Performance Policy</p> <p><i>*Tip:</i></p> <ol style="list-style-type: none"> Previous performance plan may be useful if goal will not change Use the employee self-appraisal from the previous cycle to help you create individual goals and career development activities for your employees’ plan. <p>Use Employee Portal to help you access docs in NinerTalent</p>	
	<p>Individual Goals (3-5 tasks)</p> <ul style="list-style-type: none"> 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 the individual goals add up to 50 <p><i>*See Tip 2 under Reference Guides</i></p>			
	<p>Career Development Goals</p> <ul style="list-style-type: none"> Document at least one career goal for this cycle to help gain or maintain knowledge, skills, or abilities <p><i>*See Tip 2 under Reference Guides</i></p>			

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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Process	Procedure	Deadline	Reference Guides
2. Conduct Off-Cycle Reviews 	<ul style="list-style-type: none"> Let your employee know how he/she is doing at this point in the cycle. Provide brief documentation about review in NinerTalent. <ul style="list-style-type: none"> Probationary and Talent Conversations 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 	<ul style="list-style-type: none"> Throughout cycle April, July, October, January October 31 w/in employees notice period 	“Search” SHRA Performance Guide See Performance Guide § “V. Talent Conversations” <ul style="list-style-type: none"> Performance Review Narrative Effective Talent Conversations Support Services & Resources SHRA Performance Policy
3. Hold Calibration Sessions 	<ul style="list-style-type: none"> Ensure performance rating consistency in unit based on established standards Identify and clarify unit standards to be communicated in the upcoming cycle <ul style="list-style-type: none"> Ensure consistency in similar positions by standardizing goals for positions that are the same or substantially similar 	February – March	See Performance Guide § “III. Calibration & Scoring” <ul style="list-style-type: none"> Calibration Sessions See HR website- for more resources and tools on Calibrations Sessions.
March 31 – Performance Cycle Ends			
4. Complete Performance Appraisal <div style="border: 1px dashed gray; padding: 5px; margin-top: 10px;"> Institutional Goal and Individual Goal Scores 3 = Exceeding Expectations A+ 2 = Meeting Expectations A 1 = Not Meeting Expectations D </div>	<ul style="list-style-type: none"> 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 <p><i>*See Tip 2 under Reference Guides</i></p>	May 15 Note! Process is not complete until appraisal meeting occurs and employee acknowledges plan	“Search” SHRA Performance Guide See Performance Guide § “III. Calibration & Scoring” <ul style="list-style-type: none"> 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