## ANNUAL CYCLE
- April 1 to March 31 vs June 1 to May 31
- Implementation: 11 campuses will launch Summer 2016, 7 others will launch April 2017

## 3-POINT RATING SCALE
- Exceeding Expectations
- Meeting Expectations
- Not Meeting Expectations

## PERFORMANCE PLAN
- 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
- Set by UNC General Administration for all SHRA employees
  - Five goals for all employees: Expertise, Accountability, Customer-Oriented, Team-Oriented, Compliance & Ethics
  - One additional goal for supervisors: Supervision
- Supervisors cannot change the content of these goals
- Supervisors rate the totality of an employee’s work against these goals

## INDIVIDUAL GOALS
- 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
- Peer supervisors in a work unit meet at the beginning of cycle to set expectations for employees in similar positions
- Peer supervisors in a work unit meet at the end of the cycle to set consistency of ratings for employees in similar positions

## OFF-CYCLE REVIEWS
- Types: interim, probationary, transfer, management-driven, employee-requested
- Not a full appraisal (no ratings); generally a few paragraphs
- Interim reviews only required if:
  - Employee received any rating of “Not Meeting Expectations” on last annual appraisal
  - Employees have 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
- 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
- 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
- UNC GA to develop Universal tool in partnership with campuses
- Some campuses may use an electronic version of the form (e.g., PeopleAdmin)

## EHRA EMPLOYEES
- UNC General Administration provides an optional EHRA evaluation form that complements the SHRA form. Institutions are not required to use the optional EHRA form.