HR Connections

February 13, 2020
## 2019-2020 SHRA Performance Appraisal Cycle

<table>
<thead>
<tr>
<th>Performance Appraisal Activity</th>
<th>Timeline / Due Date</th>
</tr>
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<tbody>
<tr>
<td>Performance Appraisal Cycle Begins</td>
<td>April 1, 2019</td>
</tr>
<tr>
<td>Supervisors Meet with Employees (Performance Plans)</td>
<td>April / May 2019</td>
</tr>
<tr>
<td>Probationary Employee Quarterly Appraisals Due</td>
<td>July 31, 2019</td>
</tr>
<tr>
<td>Interim / Probationary Employee Quarterly Appraisals Due</td>
<td>October 31, 2019</td>
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<tr>
<td>Probationary Employee Quarterly Appraisals Due</td>
<td>January 31, 2020</td>
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<tr>
<td>Performance Appraisal Cycle Ends</td>
<td>March 31, 2020</td>
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<tr>
<td>Supervisors Meet with Employees (Appraisals)</td>
<td>April / May 2020</td>
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<tr>
<td>Annual Appraisals (Ratings) Due</td>
<td>May 30, 2020</td>
</tr>
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Program Structure

- **Coverage**
  - All SHRA employees across the UNC system
  - The program **does not** apply to EHRA employees

- **Performance Cycle**
  - Annually: April 1st to March 31st

- **Annual Appraisal and Performance Plan**
  - Due May 30th of every year

- **SHRA Performance Appraisal Format**
  - Consistent across all UNC System Institutions
Program Structure

- **Performance Plan** (Parts 1-5 of the SHRA Appraisal Form)
  - Five Institutional Goals + One Supervisor Goal (set by UNC System)
  - Three to five Individual Goals (set by the supervisor)
  - Talent Development / Learning Plan

- **Off-cycle Reviews** (Part 6 of the SHRA Appraisal Form)
  - Interim, Probationary, Transfer, Employee Requested, and Management Driven

- **Three Point Rating Scale** (Part 7 of the SHRA Appraisal Form)
  - For each institutional goal, individual goal, and overall rating

- **Overall Comments Section** (Part 8 of the SHRA Appraisal Form)
  - Comments in each performance plan section not required
Program Structure

- **Next-Level Supervisor Review** (Parts 5 & 9 of the SHRA Appraisal form)
  - Signs employees’ annual appraisals and performance plans
  - Consistency & calibration

- **Appeal Rights** (Part 10 of the SHRA Appraisal Form)
  - Overall Rating of “Not Meeting Expectations” is grievable based on the University’s SHRA Employee Grievance Policy

- **Expectation of Ongoing Coaching and Feedback**
  - At least 3 discussions annually: Planning, Feedback, Appraisal
Appraising & Scoring: Supervisor Duties

✓ Rate employees on the institutional and individual goals based on their performance; be aware of rater biases
✓ Determine a final overall score/rating: add the sum of the institutional goals to the sum of the individual goals
✓ Ensure that comments justify and align with the performance ratings assigned
✓ Present the appraisal to the next level supervisor for review and signature before meeting with employees
✓ Meet with employees and provide candid feedback about their performance throughout the cycle, clarify expectations and provide resources.
✓ Submit ratings to designated College/Division contacts for entry into HR System by 5/30/2020
Performance Plan: Supervisor Duties

✓ Assign weights to each institutional goal

✓ Develop 3-5 individual goals and assign weights to each

✓ Create at least 1 developmental goal (recommended)

✓ Present the completed performance plan to the next level supervisor for review and signature

✓ Meet with employees to discuss and sign off on the performance plans

✓ Complete all employee performance plans by May 30th
  – Each college/division may establish other deadlines/processes
  – For new hires; complete within first 60 days
What to Expect Next - Communication

• Correspondence to SHRA Staff and Supervisors – February 2020

• HRAC/HR Connections Notification – March 2020

• Notification to College/Division Executive Leadership – March 2020

• College/Division Rating Coordinator – April 2020
Contacts & Additional Resources

- Human Resources
  - College/Division HR Representative
  - University HR Employee Relations Team
    - Phone: (919) 515-6575
    - Email: employeerelations@ncsu.edu

- For more information about the performance appraisal program or for additional online resources, please visit the Employee Relations website:
  - https://er.hr.ncsu.edu/performance-management/performance-management-shra/
Other Business/ Closing Comments