

	Performance Cycle
ANNUAL CYCLE	➤ April 1 st to March 31 st
RATING SCALE	➤ Three-point rating scale: <ul style="list-style-type: none"> • Exceeding Expectations (3) • Meeting Expectations (2) • Not Meeting Expectations (1)
EMPLOYEE PLAN	<ul style="list-style-type: none"> ➤ "Performance Plan" ➤ Complete between April 1 and May 31 ➤ Institutional Goals (50% of overall rating) ➤ Individual Goals (50% of overall rating) ➤ Talent Development Plan/Learning Plan
INSTITUTIONAL GOALS	<ul style="list-style-type: none"> ➤ Set by UNC System Office for all SHRA employees: <ul style="list-style-type: none"> • Five goals for all SHRA employees: Expertise, Accountability, Customer-Oriented, Team-Oriented, Compliance & Integrity • One additional goal for supervisors: Supervision • Supervisors cannot change these goals ➤ Supervisors rate the totality of an employee's work against the goals (performance/conduct)
INDIVIDUAL GOALS	<ul style="list-style-type: none"> ➤ Three to five strategic goals written by the supervisor for each employee for the current performance cycle ➤ Intended to align with critical business needs and the University's strategic goals
OFF-CYCLE REVIEWS	<ul style="list-style-type: none"> ➤ Types: interim, probationary, other (transfer, management-driven, employee-requested) ➤ Probationary reviews are encouraged quarterly for probationary/time-limited employees during the first 12 months of employment ➤ Interim reviews required if: <ul style="list-style-type: none"> • Employee received any rating of "Not Meeting Expectations" on last annual appraisal • Employee has active disciplinary action • Supervisor chooses to conduct review • Chancellor or designee requires reviews ➤ Not intended to be a full appraisal (no ratings) ➤ Employees can request one additional off-cycle review (if at least 60 calendar days have elapsed since the employee's last evaluation)
NEXT-LEVEL SUPERVISOR REVIEW	➤ The next-level supervisor is required to review and sign the employee's performance plan and the employee's annual appraisal before being issued to the employee

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CONSISTENCY (CALIBRATION)	<ul style="list-style-type: none"> ➤ Check and balance process to ensure the consistency of expectations and ratings
ANNUAL APPRAISAL	<ul style="list-style-type: none"> ➤ Complete between April 1 and May 30 ➤ Supervisor rates each institutional goal and individual goal to determine an overall rating ➤ Employees who received disciplinary action during the performance cycle and/or have any rating of “Not Meeting Expectations” cannot receive an overall rating of “Exceeding Expectations” ➤ Ratings submitted to UNC System Office in June
COMMENTS	<ul style="list-style-type: none"> ➤ Supervisor must include written comments that support the overall rating; comments in each section (Institutional Goals, Individual Goals, Talent Development Plan) are not required ➤ Employees may attach comments to the appraisal form and check the box indicating that comments are attached ➤ Comments clarify ratings for performance that does not meet expectations or exceeds expectations
APPRAISAL FORM	<ul style="list-style-type: none"> ➤ Human Resources provides an electronic version of the form (MS Word and PDF)