



ASPECT	SHRA EMPLOYEES	EHRA EMPLOYEES
<b>ANNUAL CYCLE</b>	<ul style="list-style-type: none"> <li>April 1 to March 31</li> </ul>	<ul style="list-style-type: none"> <li>May start 1<sup>st</sup> of April, May, June, or July (System Office: July 1-June 30)</li> </ul>
<b>3-POINT RATING SCALE</b>	<ul style="list-style-type: none"> <li>Exceeding Expectations</li> <li>Meeting Expectations</li> <li>Not Meeting Expectations</li> </ul>	<ul style="list-style-type: none"> <li>Same</li> </ul>
<b>PERFORMANCE PLAN</b>	<ul style="list-style-type: none"> <li>Complete between April 1 and May 30</li> <li>Institutional Goals (50% of overall rating)</li> <li>Individual Goals (50% of overall rating)</li> <li>Talent Development Goals (not rated)</li> </ul>	<ul style="list-style-type: none"> <li>Complete within first 60 days of cycle</li> <li>Institutional Goals (weight not req'd)</li> <li>Individual Goals (weight not req'd)</li> <li>Talent Development Goals (not rated)</li> </ul>
<b>INSTITUTIONAL GOALS</b>	<ul style="list-style-type: none"> <li>Set by UNC System Office HR for all SHRA employees               <ul style="list-style-type: none"> <li>Five goals for all employees: Expertise, Accountability, Customer-Oriented, Team-Oriented, Compliance &amp; Ethics</li> <li>One additional goal for supervisors: Supervision</li> </ul> </li> <li>Supervisors <u>cannot</u> change content of these goals</li> <li>Supervisors rate totality of employee's work against these goals</li> </ul>	<ul style="list-style-type: none"> <li>Same</li> </ul>
<b>INDIVIDUAL GOALS</b>	<ul style="list-style-type: none"> <li>3-5 strategic goals written by supervisor each cycle</li> <li>Not meant to cover the totality of the employee's work</li> <li>Aligned with critical business needs / University strategic goals</li> </ul>	<ul style="list-style-type: none"> <li>Same</li> </ul>
<b>CALIBRATION</b>	<ul style="list-style-type: none"> <li>Peer supervisors in a work unit meet at <u>beginning</u> of cycle to set expectations for employees in similar positions</li> <li>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</li> </ul>	<ul style="list-style-type: none"> <li>Not required</li> </ul>
<b>OFF-CYCLE REVIEWS</b>	<ul style="list-style-type: none"> <li>Types: interim, probationary, transfer, management-driven, employee-requested</li> <li>Not a full appraisal (no ratings); generally a few paragraphs</li> <li>Interim reviews only required if:               <ul style="list-style-type: none"> <li>Employee received any rating of "Not Meeting Expectations" on last annual appraisal</li> <li>Employees has active disciplinary actions</li> <li>Supervisor/Manager chooses to conduct interim reviews</li> </ul> </li> <li>Probationary reviews are required quarterly for probationary/ time-limited employees in first year</li> <li>Employees can request one additional off-cycle review if it has been at least 60 calendar days since their last evaluation</li> </ul>	<ul style="list-style-type: none"> <li>Not required (give feedback throughout cycle as deemed appropriate and necessary)</li> </ul>
<b>ANNUAL APPRAISAL</b>	<ul style="list-style-type: none"> <li>Complete between April 1 and May 30</li> <li>Supervisor rates each institutional and individual goal to determine overall rating *</li> <li>Comments clarify ratings for performance that does not meet or exceeds expectations</li> </ul>	<ul style="list-style-type: none"> <li>Within 60 calendar days of the end of the defined cycle</li> </ul>
<b>SECOND-LEVEL REVIEW</b>	<ul style="list-style-type: none"> <li>The second-level supervisor is required to review the performance plan and annual appraisal before being issued to the employee</li> </ul>	<ul style="list-style-type: none"> <li>Same (HR may provide second-level review for SAAO Tier 1 positions as needed)</li> </ul>

\* Employees with active disciplinary actions and/or have any rating of "Not Meeting Expectations" cannot receive overall rating of "Exceeding."