# Briefing Agenda

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Why Conduct Performance Appraisals?</td>
</tr>
<tr>
<td>II</td>
<td>Performance Planning</td>
</tr>
<tr>
<td>III</td>
<td>Managing &amp; Coaching</td>
</tr>
<tr>
<td>IV</td>
<td>Appraising Performance</td>
</tr>
<tr>
<td>V</td>
<td>Providing Constructive Feedback</td>
</tr>
<tr>
<td>VI</td>
<td>Performance Management Resources</td>
</tr>
<tr>
<td>VII</td>
<td>Performance Management Training</td>
</tr>
</tbody>
</table>
Why Conduct Performance Appraisals?

- Establish Performance Expectations
  - Identify Successes
  - Identify Performance Problems
- Establish Goals and Objectives
- Identify Training Needs
- Establish Personal and Professional Development Plans
- Salary Administration
- To Positively Impact Future Performance
Performance Management Cycle

1. Define Job Responsibilities
2. Set Expectations
3. Manage/Coach
4. Appraise Performance

Planning
Performance Planning

Define Job Responsibilities

- Ensure position description is current, including the position purpose and essential job functions
Performance Planning

Set & Communicate Performance Expectations

- Performance expectations should link to the organization’s mission, values and goals
- Performance expectations should define “how well” each function or task must be performed
- Provides a benchmark against which to evaluate work performance
Performance Planning

Set & Communicate Goals

› A statement describing a condition/result needing to be achieved

› A target to aim for, but that has not yet been hit
Performance Planning

Consider the Types of Goals

- **Development Goals** — Goals established for personal/professional growth
- **Innovation Goals** — Goals established for creating a new process, function or program; higher level of service
- **Improvement Goals** — Goals established to correct performance that is below standards and requirements
Manage and Coach Continuously

- Set Expectations
- Coach
- Counsel
- Discipline
Coaching Model

- Purpose – focus on the purpose of the meeting
- Objectives – describe the desired performance in behavioral statements
- What’s Happening Now? – describe the gap in performance you have observed
- Solicit Ideas – empower the employee to develop their own solutions to close the gap
- Review – set a follow-up date to review performance
Capturing Performance

- Observe – gather observations
- Record – record what you’ve seen and heard
- Categorize – what level is being demonstrated
Appraising Performance

Who should evaluate performance?

- Immediate Supervisor
- Department Head (if applicable)
- Co-supervisor/team leader (if applicable)
Appraising Performance

Gather and review:

- Position description
- Previously established performance expectations and goals
- Informal review notes and other supporting materials
- Employee’s “Self” Appraisal
Providing Constructive Feedback

- Convey positive intent
- State issues in specific behavioral terms
- Describe the impact on the department
- Ask for feedback
- Agree on solutions
Performance Management Resources

- UCR Core Competencies
- Performance Factors & Campuswide Standards Guidelines
- Supervisors Guide to Performance Management
- Linking Performance Expectations & Goals to the University’s Mission/Goals
- Performance Management Certificate Training
- Performance Appraisal Timeline
Performance Appraisal Forms

- Performance Appraisal Form - Narrative Option
- Performance Appraisal Form - Standard Comprehensive Version
- Performance Appraisal Form - Update Version
- Performance Factors and Campuswide Standards Guidelines
- Self-Appraisal Form
- Self-Appraisal Form - Narrative Option
- Supervisor’s Guide to Performance Management
- Supplemental Performance Feedback Form
- UC Core Competency Model Behavioral Indicators
- Behavioral Indicator Rating Sheet
- Behavioral Indicator Weighted Rating Sheet
- UCR Individual Development Plan (IDP)
- Performance Appraisal Certification Form

- To be used for all staff – both Represented and Non-Represented
Contact Information

- Seana M. Nunez-Grider
  - (951) 827-1442
  - seana.nunez@ucr.edu

- Mary E. White
  - (951) 827-2622
  - mary.white@ucr.edu