

Align Performance Program

Use this document along with the [Align Program Overview video](#) to learn more about key program details and find answers to frequently asked questions.

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KEY PROGRAM DETAILS

CHECK-INS

ACHIEVE Beginning in 2025, check-ins will be conducted twice per year. Your school/unit will determine the schedule.

For more details about the check-in schedule, see the [Frequently Asked Questions Check-In](#) section below.

KEY DELIVERABLES: THE “WHAT”

Goals will be eliminated, and staff will instead focus on “key deliverables” - the important outcomes and results staff are expected to accomplish during a check-in period. Key deliverables can range from primary job duties to special projects but should not include all tasks completed during the period. Every staff member will have at least one key deliverable per check-in period with a maximum of five to ensure focus on the most important outcomes.

For more details about key deliverables, see the [Frequently Asked Questions Key Deliverables](#) section below.

KEY BEHAVIORS: THE “HOW”

Each school/unit will emphasize three behaviors that best support their direction and define how staff act while accomplishing their key deliverables. These behaviors will be communicated directly to you by your leadership.

People leaders will also have three additional expectations to demonstrate: establish alignment and direction, engage employees, and deliver results.

For more details about key behaviors, see the [Frequently Asked Questions Key Behaviors](#) section below.

RATINGS AND FUTURE FOCUS

Ratings are being introduced to ensure collective understanding and appraisal transparency between staff and leaders after each check-in. Ratings provide the basis for identifying what to focus on next. Through regular one-on-ones and check-ins, staff and leaders will have many opportunities to discuss and align on what knowledge, skills, resources, and support are needed to get to the next level of performance and prepare for future opportunities.

FREQUENTLY ASKED QUESTIONS

TRANSITION FROM ACHIEVE

1. When did ACHIEVE get deactivated?

ACHIEVE was deactivated on June 30, 2024. Prior check-ins will eventually be made available; however, for immediate access, staff were reminded to download and save copies of prior check-ins in May and June 2024. Staff no longer have access to the website or prior check-ins via the system.

2. When does Align Performance Program launch?

Align will launch in mid-August 2024. In September, each campus school/unit leader will share additional details specific to their organization. The new online system will be released in late October.

3. Why are we implementing a new performance program?

UCI's new streamlined and updated performance program has been designed to empower each staff member to contribute to the success of their school/unit and UCI to remain compliant with UC policy. The new program establishes a framework for regular, two-way dialogue between staff and leaders about current areas of focus, key deliverables, progress, and definitions for success. Staff members will experience how their efforts make an impact in their unique role, leaders will gain greater insights into the potential of each staff member, and schools/units will see greater results from aligned efforts.

4. What should eligible staff and leaders do between now and the launch of the new program regarding performance discussions?

Staff and supervisors should attend the various Align training that will be offered and continue to meet regularly to discuss priorities and key deliverables. Beginning in late October, staff should enter key deliverables into Align.

5. How was the new program developed?

Align was developed based upon best practices research and significant input from various stakeholders across the enterprise, including an Advisory Committee including Deans, Vice Chancellors and ASMs, focus groups and several design meetings with senior administrators.

CHECK-INS

6. If my school/unit is doing Check-Ins in February and July, when are the review periods?

For the first check-in February 2025, due to the transition, the review period will be slightly shorter than normal, from October 2024 - February 2025. The July 2025 check-in review period will be from March 2025 - July 2025. After the first full year of the program, the February check-in period is from August - February (7 months) and the July Check-In period is from March – July (5 months).

KEY DELIVERABLES

7. How are Key Deliverables different from Goals we used in ACHIEVE?

Key deliverables are exclusively related to performance in the current role. They highlight important outcomes that each staff member is expected to accomplish within the check-in period. Establishing and discussing key deliverables is an opportunity to focus the efforts of every staff member towards a larger strategic imperative or operational priority. Key deliverables allow each member to contribute their unique skills and experience, in the scope of their current role, and see the results of their accomplishments.

Key deliverables are **not** career development goals, performance improvement plans, corrective actions, or engagement goals. Key deliverables do not itemize every job duty or task. The intent is to help staff focus and prioritize what needs to be accomplished, with clear criteria and expectations. Best practice research indicates that typically two (2) to three (3) key deliverables should suffice to capture the important priorities. There is a limit of five (5) key deliverables in the new program.

8. What is the Rating Scale for Key Deliverables?

4: SURPASSED – Successfully completed more than the specified key deliverable and exceeded all established criteria (time, quality, results, etc.).

3: ACCOMPLISHED – Successfully completed the specified key deliverable and met all established criteria.

2: PARTIALLY ACCOMPLISHED – Completed part of the specified key deliverable, missed on some established criteria.

1: NOT ACCOMPLISHED – Did not complete any of the specified key deliverable within the established criteria.

9. SCENARIO 1: What if a key deliverable is no longer applicable at the time of check-in?

Situation: A key deliverable was originally approved but deliverable was cancelled mid-period and no additional deliverables were assigned in its place.

Required Condition: Employee must have more than one fully approved key deliverable.

Solution:

- Both employee and manager enter comments in the Comments/Progress section confirming that the key deliverable is no longer applicable.
- Employee and manager rate the key deliverable to maintain the average of the remaining key deliverable(s).
 - If ending with one key deliverable, rate all deliverables the same.
 - If ending with multiple key deliverables, rate canceled key deliverable equal to the average of the active deliverables (round up if needed).

10. SCENARIO 2: Is it possible to replace a key deliverable with a new one mid-period?

Situation: Original key deliverable changed/cancelled mid-period but a new deliverable could not be added because the key deliverable setting period had closed.

Required Condition: Employee must have at least one previously approved key deliverable.

Solution:

- Using the Comments/Progress section, employee indicates original key deliverable is no longer applicable and enters in new key deliverable.
- Manager confirms new key deliverable by adding comments in the Comments/Progress section.
- Use the Rating drop-down and Assessment text field to assess the new deliverable.
 - Include comments in the Assessment text field indicating comments are for the new key deliverable.

11. SCENARIO 3A: What if I need to add a new key deliverable mid-period?

Situation: Additional deliverables assigned mid-period but couldn't be added in Align.

Required Condition: Employee must have at least one previously approved key deliverable.

Solution:

- Use one of the existing key deliverables to add additional deliverable(s).
- Using the Comments/Progress section, employee enters the new key deliverable and indicates it is a separate key deliverable.
- Manager confirms new key deliverable by adding comments in the Comments/Progress section.
- Use the Rating drop-down and Assessment text field to assess both original and new deliverable.
 - Select the Rating that is closest to the average rating of the deliverables, standard rounding rules apply.
 - Include comments in the Assessment text field indicating rating and comments are for both key deliverables.

12. SCENARIO 3B: What if one key deliverable contains multiple deliverables at check-in? How will each deliverable be assessed?

Situation: Rather than submitting separate key deliverables, multiple deliverables were entered into key deliverable tab.

Required Condition: Employee must have at least one previously approved key deliverable.

Solution:

- Use the Rating drop-down and select the Rating that is closest to the average rating of the deliverables, standard rounding rules apply.
- Use the Assessment text field to note rating for each individual key deliverable.

KEY BEHAVIORS

13. What are the behaviors that schools/unit will be evaluating?

Below is a list of the UC's 10 Core Competencies/Behaviors. Your school/unit has selected three of these to evaluate based upon current unit strategies and challenges:

- Belonging and community
- Change agility
- Collaboration
- Communication
- Continuous improvement
- Continuous learning
- Mission and vision focus
- Problem solving
- Service focus
- Stewardship

In addition to the three selected school/unit behaviors, leaders will be evaluated on the following competencies.

- Establish alignment and direction
- Engage employees
- Deliver results

Definitions for both sets of competencies/behaviors can be found here: [UC Core Competencies and Definitions](#)

UCI Health co-workers will be evaluated on the ARIISE values. Definitions for these values can be found here: [ARIISE Values](#)

- Accountability
- Respect
- Integrity
- Innovation
- Service
- Excellence

14. What is the Rating Scale for Behaviors?

4: ALWAYS – Consistently models the behavioral anchors.

3: MOST OF THE TIME – Displays the behavioral anchors often.

2: SOMETIMES – Displays the behavioral anchors inconsistently.

1: RARELY – Seldom displays the behavioral anchors

15. How is the combined Overall Rating calculated?

The overall rating is automatically calculated. It is equal to the sum of the averages of the key deliverables rating and behaviors rating. The overall rating calculation will be a score up to a maximum of 8.0.

16. I am not a supervisor or manager, but three leadership behaviors appear on my check-in.

If you have ever supervised anyone, including student workers, you may still be flagged in UC Path as a supervisor. If you no longer supervise anyone, there may need to be a correction in UCPATH. Contact your department HR professional for assistance.

17. I currently do not supervise anyone because the positions under me are vacant. Do the three leadership behaviors still apply to me?

The leadership behaviors apply to current supervisors and managers even when positions under them are vacant.

18. When can a school/unit change schedules or behaviors?

Units may request changes after 2 check-in cycles have completed (one year of Check-ins). Change requests must be submitted in advance of the current Check-in cycle closing.

19. Can a school/unit use their own behaviors or values?

After a full year of check-ins, if a unit prefers to leverage any alternate behavior/values model, it must be a fully developed library that includes the behavior/value, overall descriptor, and behavioral indicators/anchors. The school/unit is also solely responsible for maintaining and communicating the model to their school/unit. There may be a programming cost to implement a custom model.

APPLICABILITY

20. I am new to the organization, how is my performance being evaluated?

If you are a non-represented career, partial year career, or contract employee, Align will be used to evaluate your performance. If you have questions, please contact your supervisor.

21. When will check-ins for new hires be created?

A check-in will be automatically created for a new hire 30 days after their hire date. This gives the employee and supervisor time to discuss the Align program and identify key deliverables.

22. Can Align be used with probationary employees?

Yes, check-ins can be used for probationary employees.

23. Can Align be used for contract employees?

Yes, the check-in can be used for non-represented career, partial year career or contract employees.

24. What happens if an employee is on Leave of Absence?

A new check-in will not be generated while an employee is on leave of absence (LOA). Once the employee returns to Active Status in UCPATH, the system will automatically generate a check-in and the employee begins the process at that date (even if it's past the stage's milestone due date). There is about a 3-day lag for the updated UCPATH payroll status to cascade to Align.

If a check-in is released before the employee goes out on LOA, the check-in will remain in whatever stage it's in until the employee returns. The employee can pick up where they left off, even if that's past the stage's milestone due date.

If a check-in closes while the employee is on LOA, whatever key deliverables they had established, and whatever state they were in, will automatically copy over to the next check-in cycle.

25. Will the Align system show the employee was on LOA?

There will be no indication that an employee was on LOA for a particular check-in in Align. It will show as "Closed Incomplete"; however, it is recommended that the manager or indirect manager notate that in the key deliverable journal comments before the check-in closes.

26. Can Align be used for represented employees?

No, the check-in can be used for non-represented career, partial year career or contract employees.

NOTIFICATIONS

27. Are there notifications to inform me when I need to take action?

Email notifications are sent by the system when tasks are assigned to employees and managers. Reminder notifications for tasks are also sent before the task due date. Email notifications are also sent when key deliverables have been fully approved and check-ins have been completed and closed.

28. Can I disable the system emails?

Email notifications cannot be disabled individually. They are enabled to ensure

completion of open tasks by the deadlines. Additionally, certain notifications have enhanced functionality such as including a copy of approved key deliverables that can be printed/saved and referenced throughout the working period.

SUPPORT

29. Where can staff go for assistance?

For questions or additional support, please contact the UCI Employee Experience Center (EEC) at eec@uci.edu or 949.824.0500, Monday – Friday, 8:30 a.m. – 5:00 p.m.