**PERFORMANCE MANAGEMENT 2017 FOR NON-REPRESENTED EMPLOYEES**

Below is a summary of the new performance management program for 2017 and beyond.

**WHY**

**To improve organizational performance.**

UCI is a premiere public research university and academic medical center. To maintain our position and advance even higher, we must work smarter, better, faster. We have to encourage bold, innovative thinking, allow for calculated failure and learn from our mistakes in order to continually improve our organization and meet the demands of tomorrow. To achieve this, we must become an agile, performance driven, engaged workforce, and the way we do this is through a performance management program that supports such a workforce.

1. **An agile workforce.**

Future needs are continually changing. An agile workforce is accepting of change, eager to streamline and simplify, open to sharing information and collaborating, and future oriented. For a workforce to be agile, frequent, honest two-way communication that looks forward rather than backward is needed between employees and their supervisors. By opening up the lines of communication, we can adjust in real time to ever-changing situations. We create an organic, living, flexible workforce that is ready to take on anything.

1. **A results oriented, performance driven workforce.**

Chancellor Gillman has put in place our strategic plan that sets forth an ambitious path to reach new heights of excellence and social impact. The way to drive UCI to new heights is to align employees’ individual and team goals with the organization’s strategic goals. When employees have a direct line of sight between their performance and the goals of the organization, they understand the value of their contributions and the important role they play in helping the organization achieve success. Evaluating employees’ performance goals and the progress towards achieving those goals on a regular basis drives performance.

1. **An engaged workforce.**

Employees who receive regular coaching, mentoring and professional development from their supervisors and have direct line-of-sight between their performance contributions and the success of the organization, feel empowered, energized, connected and committed to the organization. This increased engagement results in employee retention, innovative, efficient, cost effective solutions, and, overall improved organizational performance.

**WHAT**

Below are the key elements of the new performance management program. The new program was designed to support a more agile, performance driven and engaged workforce:

1. **Check-in discussions.** Traditional end of year performance reviews that hold people accountable for past behavior will be replaced by frequent informal check-in discussions that focus on improving current performance and grooming talent for the future. There will no longer be a beginning or an end to the performance discussion cycle – it will be continual.
2. **Check-in form.** The traditional performance evaluation form will be replaced with a shorter “check-in” form that is focused on goals and creating dialogue between the employee and supervisor. The form will be used to guide the check-in discussion between the employee and the supervisor.
3. **Focus on goals and feedback questions**. Check-ins will be conducted quarterly in July, October, January and April. Check-in discussions will focus on goals progress and questions that are focused on driving performance. It is not required that goals be completed within a quarter – goals can span over multiple quarters if applicable.
4. **Eliminate performance evaluation ratings**. Performance ratings that require considerable time to document and justify will be eliminated and replaced with value-added continual dialogue between the employee and their supervisor
5. **Online technology**. Paper forms with be replaced with online technology no later than January 2018. Until then, check-ins will be completed via an interim electronic check-in form.
6. **Merit.** In years when a merit fund is available, check-in documentation as well as UCI merit criteria will be used to determine merit levels and merit awards. Employees will be recognized and rewarded based on their performance contributions to the organization.

**WHEN**

Starting July 1, 2017, non-represented employees will no longer complete annual performance evaluations. Instead, they will participate in quarterly check-ins with their supervisors.

Key milestone dates for the new performance management program are:

**[JULY 2017] [SEPTEMBER 2017] [OCTOBER 1 2017]**

**Define Your Goals Prepare for Check-In Check-In with Supervisor/Manager**

**HOW**

A temporary interim electronic check-in form has been developed for employees and supervisors to document goal progress and responses to four required feedback questions (plus one additional question for supervisors). Using an interim form is only a short-term solution. In late 2017 we will be moving to an online application to facilitate the performance management process. This means that the October 1 check-in and perhaps the January 1 check-in will be completed using the interim form. Further information and instructions regarding the new system will be released closer implementation.

At the campus and health sciences, this template will be available as a fillable PDF at hr.uci.edu/partnership/performance. At the medical center, this template will be available in HRConnect.

Below are the steps you will need to complete by October 1, 2017. It’s as simple as 1, 2, 3.

**[1]**

**[JULY 2017]**

**Define Goals**

1. On July 1, employees and supervisors begin thinking about the goals to be achieved. Employees and their supervisors meet in-person by August 1, 2017 to agree upon goals\*
2. For each goal, sub-goals, key performance indicators (KPIs), or milestones may be defined
3. Once goals are determined, the supervisor enters the employees’ goals onto the check-in template. Any changes to goals are discussed by both parties and entered by the supervisor.

*\*At the medical center, employees will include their CEMRP annual individual objectives in their list of performance goals. This will allow employees and supervisors to discuss progress on CEMRP objectives throughout the year. HRConnect/PeopleSoft will continue to be the system of record for CEMRP objectives.*

**[2]**

**[SEPT 2017]**

**Prepare for Check-In**

1. In preparation for the in-person check-in discussion, the supervisor forwards the check-in document to the employee who conducts a self evaluation on goals progress
2. The employee also answers four performance feedback questions:
3. How have you performed as an **enterprise contributor** and demonstrated **innovation** during this check-in period?
4. What additional information, knowledge, skills, resources do you need to **master your job** and **accomplish goals**?
5. What are you most proud of and what additional accomplishments have you achieved in this check-in period?
6. What would increase your job satisfaction and success?
7. After completing the self-check in, the employee saves the document and forwards to the supervisor.
8. The supervisor then conducts the employee check-in by providing feedback on goals progress and responses to the four performance feedback questions listed above. The supervisor also completes the following additional question:

What am I doing to maximize our team's talent and organizational capabilities to help the organization achieve its strategic goals?

1. After completing the employee check-in, the supervisor saves the document and forwards to the employee.

**[3]**

**[OCT 1 2017]**

**Check-In Discussion**

1. Before the employee and supervisor meet for the quarterly check-in, each reviews the completed check-in document to familiarize themselves with the feedback. This will make the time spent during the check-in most productive.
2. Hold the in-person check-in discussion
3. Any changes to the check-in document as a result of the discussion are entered by the supervisor. The supervisor then forwards the final check-in to the employee.
4. The employee and supervisor each retain a copy of the final write-up.
5. The supervisor then copy/pastes the goals from the completed October 1 check-in to the newly created January 1 check-in and the process is repeated.

QUESTIONS? Check out our FAQs.

More questions? Contact your human resources business partner or consultant.

Check back often for updates and even more information on performance management 2017 and beyond.