Performance Evaluation

Links

- PE Overview from HR
  - Performance Appraisals & Reclassifications (RAL)
  - The new Evaluation Form.
  - List of Competencies
- Performance Evaluation Overview - March 15, 2019

Official Communication

Feb 6, 2019

Dear RAL Staff,

The new Performance Evaluation (PE) processes (forms, steps, etc.) have been completely revised this year. RAL is one of the early adopter labs as HR works to scale the process beyond last years' pilot group. We do expect changes between this year and next year. The forms will be integrated into Work Day starting in July 2019. This year, we will use Word document forms. The form is the same for all job categories.

RAL's internal website (Performance Appraisals & Reclassifications) for this process has been updated and it provides the PE schedule for our job categories, as well as links to the HR site. The UCAR HR website for Performance Evaluation is here, and most importantly, here is a link to the new Evaluation Form. UCAR is providing much more guidance for this process than it did in the past. This main website has a number of useful links including, Rating Scale, List of Competencies, and a template for gathering feedback. Additional guidance and hyperlinks can be found in the form itself.

<u>PERFORMANCE REVIEW PROCESS</u>
Generally, the process flow is similar to what RAL has done in the past. Supervisors will drive the process starting with supervisors communicating with supervisees about discussing goals and plans to achieve them.

<u>SMART Goals</u>
The first step focuses on employee goal setting and professional development. SMART goals mean "Specific, Measurable, Achievable, Relevant and Time-bound." It is VERY IMPORTANT that you do not over-think the SMART goals. The goals should make sense in the context of your work and (typically) near-term aspirations. Longer-term, professional development goals are perfectly fine as well, but keep in mind that there is a renewed focus on completion of each goal over the 12-month performance period.

*SMART goals are typically identified at the beginning of the performance period and assessed during the end of year performance evaluation. However, because we are starting a new process, the SMART goals entered in the new PE form should cover **last year's (2018-2019) stated goals**. New, forward-looking SMART goals will be identified for the next performance season at the same time or shortly after you talk to your supervisor about your performance review.*

<u>Competencies</u>
Each of the two core (required) competencies (Functional Knowledge and Skills, and Embracing an Ethical, Diverse, and Welcoming Environment) and three additional competencies (e.g., Communication, Leadership, Self-management, etc.) should be used at least once in the goals section. See the list of competencies here.

<u>Key Activities vs Employee Accomplishments</u>
The Key Activities information we are familiar with from our past reviews are still relevant, but they now get inserted in the "Employee Accomplishments" section. However, instead of including all of the task and activity information you included in the past, this section should focus on "accomplishments," so try to keep this section concise and to the point. Employee accomplishments may include summary information on:

- *Project support (group projects needing less than 20% time)*
- *Publications, proposals, presentations, community service, student support*
- *Research and development accomplishments*
- *Supervision (for supervisors of course, see below)*
- *Mentoring (for anyone who may do this, see below)*
- *Leadership/Outreach (see below)*

If there are accomplishments related to your goals, they should also be entered into the GOALS section.

<u>Workflow Steps</u>
1) Supervisor and supervisee work together to share the form. One option is to upload the evaluation form to their personal Google Drive and share it with the supervisee.

2) Supervisees start the process by identifying (up to five) SMART goals, entering employee accomplishments, and some professional development activities.

- *Employee Accomplishments can be organized in this section into key activities similar to the previous process.*

- *Regarding Supervision and Mentoring as a key activity. Combine these if you do both of them. Otherwise, remove one, the other or the entire activity as appropriate.*
- *Regarding "Leadership/Outreach" as a key activity. Please include this activity if it is appropriate. Consider if you engage regularly in a position of guidance or leadership. Consider if you provide guidance to RAL management. Lastly, consider if you are active on any organization-wide groups or committees or otherwise engage with people across NCAR/UCAR. In any of these cases it is appropriate to include this activity.*

- *Indicate Professional Development activities (there is a link to additional information in the form itself). If you have engaged in recent professional development activities that fall into this category please feel free to include them.*

3) The supervisee then provides the PE form to the supervisor who completes the evaluation. The form is not shared at this stage. The completed evaluation is then reviewed up the management chain in the same manner as in previous years.

Please don't hesitate to ask for further clarification from your supervisor, Program Director, Liz Hoswell, and HR.

Thank you,
Bill