**Instructions for Setting EHRA Non-Faculty Performance Goals**

**When Do I Set Goals?**

Performance goals are mandatory and should be set at the beginning of each performance evaluation cycle which runs from July 1st to June 30th.

**What is the Right Number of Goals?**

Supervisors should establish at least three (3) goals and objectives for the employee. We recommend no more than five (5) goals.

**Where Should We Focus?**

Goals and objectives should be based on key business needs, strategic initiatives, and principal functions of the position. These goals are not intended to cover all aspects of the employee work product. They should be focused on key results, outcomes and deliverables and may be:

* **Critical-Function -** highlight some of the most critical work needs in the position description
* **Compliance-Focused** - ensure compliance with relevant policies, procedures, regulations, and/or job requirements
* **Project-Oriented** - may be regular or one-time work that is significant during the cycle
* **Work-Unit Specific** - improve and/or sustain work product or related team dynamics
* **Division-Wide** - tied to University strategic goals and/or initiatives
* **Forward-Focused** - align with the unit and the University strategic goals and mission

**Does My Employee Have a Say in This?**

Yes! It is important that the employee have a voice in the process to ensure buy-in and engagement. Often managers will have the employee take the first pass at creating their own goals for the upcoming performance period.

**How Do I “Connect the Dots” for my Employees?**

It is important that individuals see how their work is tied to the overall mission, vision and priorities of their organization. Whenever possible, your employee’s goals should be aligned to The University of North Carolina System Strategic Plan, UNC-Chapel Hill Blueprint for Next Strategic Plan, UNC-Chapel Hill Institutional Goals and your Division/School goals. Linking these higher-level goals and strategic priorities to the individual’s performance goals will enable the individual to connect their performance to the performance of their division/school as well as the University and the System as a whole. Refer to the Goal Alignment Worksheet to help “connect the dots”.

**Where Can I Find More Information?**

For additional information and resources for writing individual goals, please visit the OHR website at <https://hr.unc.edu/managers/performance/ehra-evaluation/>

**Instructions for Creating a Professional Development Plan**

Discuss professional development activities with the employee and determine the appropriate activities to be established during the performance cycle. These may include activities for employee growth and/or to address performance. Some examples of professional development activities may include training programs, committee work, conference attendance and/or presentations, or other related activities that maintain, develop or broaden employee skills relevant to the employee’s position, career path, or service to the University.

**Goal Alignment Worksheet**

Individual Annual Performance Goals should be aligned to one or more higher-level goals or strategic plans outlined below.

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| **University of North Carolina System Strategic Plan** | **UNC-Chapel Hill Blueprint for Next** | **Institutional Goals** | **Division/School Goals** |
| **ACCESS**: the opportunity for all North Carolinians who are prepared for the associated rigorous learning experiences to pursue a university education.  **STUDENT SUCCESS**: A combination of positive intellectual, personal, and social development facilitated by a high-quality university education. The development of competencies — critical and creative thinking, life-long learning, technological mastery, resilience, effective communication, flexibility, and collaboration, among others — for meaningful engagement in 21st-century life. The timely acquisition of a degree.  **AFFORDABILITY & EFFICIENCY**: A working compact among the state’s elected officials, taxpayers, and UNC to deliver the University’s multifaceted mission at the highest levels of quality in a cost-effective manner without regard to a student’s ability to pay.  **ECONOMIC IMPACT & COMMUNITY ENGAGEMENT:** Preparing graduates to be well-rounded citizens and lifelong learners to meet the state’s long-term needs; improving quality of life; investing in foundational research; speeding the discovery, application, and translation of research; and deepening sustained partnerships that strengthen local communities and the state’s economy.  **EXCELLENT & DIVERSE INSTITUTIONS:** The University’s constituent institutions are individually distinct and mission-focused and collectively comprise an inclusive and vibrant university system, committed to excellence and the fullest development of a diversity of students, faculty, and staff. | **Pillar 1 – OF THE PUBLIC, FOR THE PUBLIC.**  We will:  • Eliminate all barriers to a great education.  • Bring expertise to bear for the benefit of North   Carolina and beyond.  • Work for democracy: develop citizen-leaders   and encourage informed public discussion.  **Pillar 2 – INNOVATION MADE FUNDAMENTAL**  We will:  • Value and prioritize foundational research and  creative practice.  • Meet the imperative for learning that is   personalized, experiential, collaborative, and   data-literate.  • Translate research into professional,   commercial, and societal uses.  • Adapt to evolving workforce and student need  **CROSS-CUTTING IMPERATIVES**  • Aspire to preeminence.  • Help us serve as the economic powerhouse for   the state.  • Prepare our graduates for the new economy and   contemporary life.  • Adopt a global mindset.  • Address big societal questions. | (*Refer to the HR website for more detailed descriptions of institutional goals. These will be rated on the annual appraisal on a 3-point scale (Not Meeting, Meeting, Exceeding Expectations*)  **EXPERTISE**: Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession. Maintains technical skills and relevant professional credentials.  **ACCOUNTABILITY:** Completes required volume of work by established deadlines and stays productive throughout workday. Takes sufficient/ appropriate measures to plan and organize work, prioritize tasks, and set realistic goals.  **CUSTOMER-ORIENTED:** Listens to determine the most effective way to address customer needs and concerns. Follows through on commitments, despite time pressures or obstacles, and maintains relevant communication with customers until job is completed.  **TEAM-ORIENTED:** Communicates and engages directly, clearly, and tactfully with colleagues. Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs.  **COMPLIANCE & INTEGRITY:** Complies with personnel and equal opportunity policies, including prohibitions on harassment, discrimination, and violence, and all other policies. Complies with all safety requirements for the position.  **SUPERVISION (For Supervisors Only):** Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing. Provides clear objectives that foster work unit development and align with university values and goals. | *Insert Division/School Goals Here* |

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| **ANNUAL PERFORMANCE APPRAISAL CYCLE** *(Dates From/To)***:** | | |  | **to** |  |
| **Dept. Name:** |  | **Employee Name:** |  | | |
| **Supervisor Name:** |  | **Position Title:** |  | | |
| **Supervisor Title:** |  | **Employee ID:** |  | | |

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| **INDIVIDUAL GOALS & OBJECTIVES** | | **Enter a minimum of three (3) performance goals below.** | | | | |
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| **GOAL #1 -- Title:** | |  | | | |
| **Description:** | | | | | |
| **GOAL #2 -- Title:** | |  | | | |
| **Description:** | | | | | |
| **GOAL #3 -- Title:** | |  | | | |
| **Description:** | | | | | |
| **GOAL #4 -- Title:** | |  | | | |
| **Description:** | | | | | |
| **GOAL #5 -- Title:** | |  | | | |
| **Description:** | | | | | |
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| **SIGNATURES FOR ANNUAL PERFORMANCE GOALS** | | | | | |
| **Supervisor:** |  | | **Date:** | |  |
| **Employee:** |  | | **Date:** |  | |

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| **ANNUAL PERFORMANCE APPRAISAL CYCLE** *(Dates From/To)***:** | | |  | **to** |  |
| **Dept. Name:** |  | **Employee Name:** |  | | |
| **Supervisor Name:** |  | **Position Title:** |  | | |
| **Supervisor Title:** |  | **Employee ID:** |  | | |

**Professional Development Plan**

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| **Professional Development Activities** | Examples of professional development activities may include training programs, committee work, conference attendance and/or presentations, or other related activities that maintain, develop or broaden skills relevant to the employee’s position, career path, or service to the University. | | |
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| **Activity #1 -- Title:** | |  |
| **Description:** | | |
| **Activity #2 -- Title:** | |  |
| **Description:** | | |
| **Activity #3 -- Title:** | |  |
| **Description:** | | |

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| **SIGNATURES FOR PROFESSIONAL DEVELOPMENT PLAN** | | | | |
| **Employee:** |  | **Date:** | |  |
| **Supervisor:** |  | **Date:** |  | |