



Setting the Stage for a Successful Performance Conversation

Manager Session



Question and Answer

All questions (1) My questions (1)

J jprocel (You) 04:55 PM

When can I submit my self-assessment?

Type your question here...

Send anonymously

Who can see your questions?

01:41

Timer for activities

Webinar Chat

Who can see your messages?

To: Everyone

Your text can be seen by panelists and other attendees

Leave

Jessica Procel

Audio Settings

- Chat
- Raise Hand
- Q&A
- Hide Captions

Use the chat feature to participate in activities

Click to submit a question

What has been your experience giving performance appraisals in the past?





What do you wish it was like?

By the end of today's session, you will be able to:



Explain the value and purpose of appraisals



Use best practices and resources for employee appraisals



Complete performance appraisals in Carolina Talent



Deliver fair and unbiased performance feedback

Giving regular performance feedback, including appraisals,
is a core manager responsibility.

Improvement and
development

Enhancing
communication and
morale

Aligning performance
with organizational
goals

PERFORMANCE MANAGEMENT PROCESS

May 20 - June 3

STARTS
March 15 - 31

SELF-ASSESSMENT

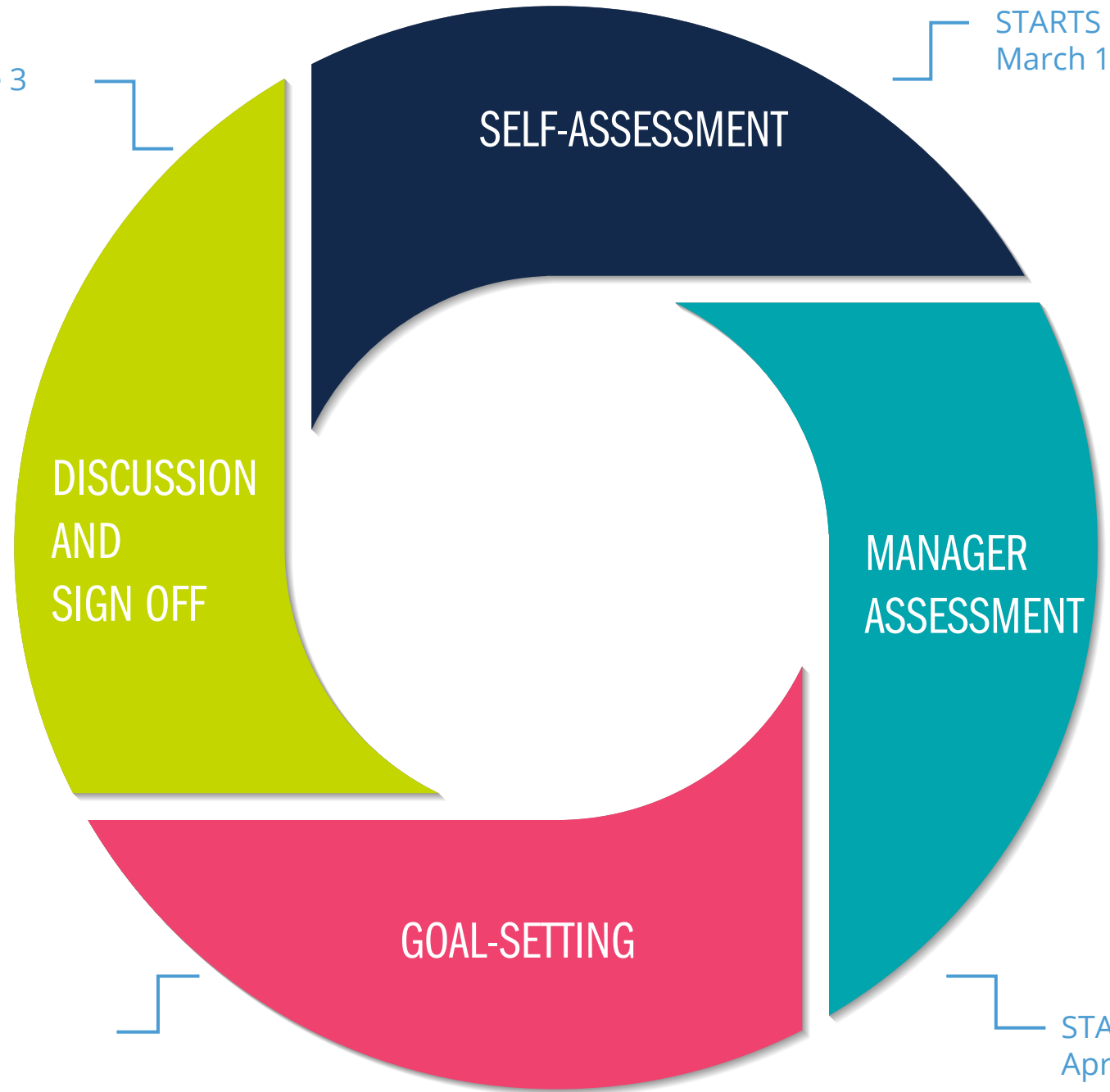
DISCUSSION
AND
SIGN OFF

MANAGER
ASSESSMENT

GOAL-SETTING

STARTS
MAY 1

STARTS
April 1 - 30





Complete performance appraisal for SHRA/EHRA-NF

Assess SHRA competencies

Collaborate with your employees on individual and developmental goals

Feedback on performance and developmental goals should happen year-round.



Job Description

Employee performance

University and Department Strategic Goals

Individual Goals

Prepare for the appraisal



Consider performance for the entire year



Seek multiple perspectives



Review the employee's self-assessment



Align performance with goals



Be aware of possible biases

**What is bias and how can it impact
performance reviews?**

Be aware of possible biases



Halo/Horns



Contrast



Affinity Bias



Recency



Implicit

Prepare for the appraisal



Consider performance for the entire year



Seek multiple perspectives



Review the employee's self-assessment



Align performance with goals



Be aware of possible biases

Use rating scale when evaluating

EXCEEDING EXPECTATIONS

Performance consistently exceeds expectations

Employee regularly demonstrates mastery of the duties and responsibilities and/or makes exceptional or unique contributions to the organization

MEETING EXPECTATIONS

Performance consistently meets expectations

Employee regularly performs the job at the level expected

Employee is responsive to guidance and feedback, only moderate oversight needed

NOT MEETING EXPECTATIONS

Performance is not consistently met

Employee does not perform the job at the level expected

Manager finds it necessary to continue to address performance issues

Activity 1

1 question

1. Match the employee to the appropriate performance rating:
(Matching)

A. Shir

B. Krisya

C. Alex

A.

Select an option



B.

Select an option



C.

Select an option



Submit

Participate in poll/quiz questions.

01:41

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Jessica Procel

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Activity 1: Rating Case Study

Administrative Support Specialist

Goal: Efficiently manage and organize division documents and records

- A. Shir regularly demonstrates an understanding of the importance of document confidentiality and ensures that sensitive information is appropriately secured and accessible only to authorized staff.
- B. Krisya identified the need for, initiated and led a successful training session for authorized staff on how to use the new systems for locating and securing documents with a focus on ensuring confidentiality while also improving access and the overall experience for staff.
- C. Alex inconsistently follows processes to ensure document confidentiality that he has been trained on, and this has led to sensitive information being inadequately secured and improperly shared.

Is the employee:

- **Exceeding Expectations**
- **Meeting Expectations**
- **Not Meeting Expectations**

**Share your answers
via the Poll**

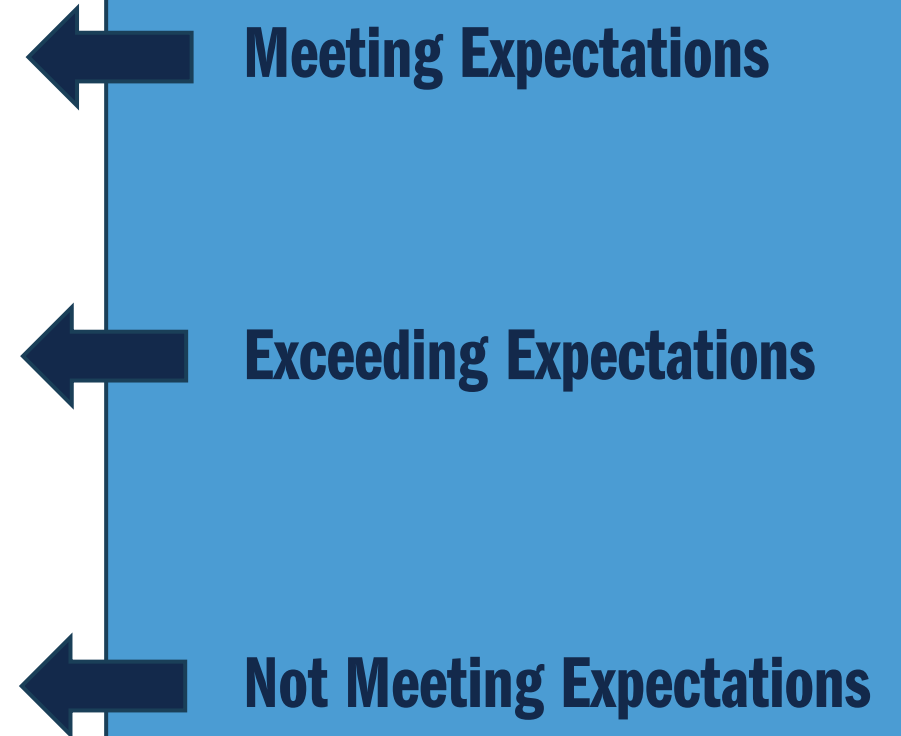


Activity 1: Rating Case Study

Administrative Support Specialist

Goal: Efficiently manage and organize division documents and records

- A. Shir **regularly demonstrates** an understanding of the importance of document confidentiality and **ensures** that sensitive information is **appropriately** secured and accessible only to authorized staff.
- B. Krisya **identified the need** for, **initiated** and **led** a **successful** training session for authorized staff on how to use the new systems for locating and securing documents with a focus on **ensuring** confidentiality while also **improving** access and the **overall experience** for staff.
- C. Alex **inconsistently** follows processes to ensure document confidentiality that he has been **trained on**, and this has **led to** sensitive information being **inadequately** secured and improperly shared.



Activity 2: Rating Case Study

Laboratory Manager

Goal: Maintain lab safety and compliance

Sonja effectively maintains lab safety and compliance to adhere to regulatory standards and guidelines. She diligently conducts regular safety inspections, addressing any identified hazards or deficiencies in a timely manner. She provides basic safety training to lab personnel upon onboarding and offers periodic refresher courses to reinforce safety protocols. Additionally, she ensures that all necessary safety equipment and signage are in place and maintains accurate records of safety inspections and training sessions. While I would like to see Sonja take greater initiative to implement preemptive measures beyond the regulatory requirements, her consistent efforts ensure that the lab operates in compliance with safety regulations and guidelines, minimizing risks to personnel and the environment. Sonja is well-positioned for continued success in her role.

Is the employee:

- **Exceeding Expectations**
- **Meeting Expectations**
- **Not Meeting Expectations**

**Share your answers
via the Poll**



Activity 2: Rating Case Study

Laboratory Manager

Goal: Maintain lab safety and compliance

Sonja **effectively** maintains lab safety and compliance to adhere to regulatory standards and guidelines. She **diligently** conducts **regular** safety inspections, addressing any identified hazards or deficiencies in a **timely manner**. She provides **basic** safety training to lab personnel upon onboarding and offers **periodic** refresher courses to reinforce safety protocols. Additionally, she ensures that all **necessary** safety equipment and signage are in place and maintains **accurate** records of safety inspections and training sessions. **While I would like to see** Sonja take **greater initiative** to implement **preemptive** measures beyond the regulatory requirements, her **consistent efforts** ensure that the lab operates in compliance with safety regulations and guidelines, minimizing risks to personnel and the environment. Sonja is **well-positioned** for continued success in her role.

Meeting Expectations

Activity 3: Rating Case Study

Groundskeeper

Goal: Maintain and enhance the aesthetic and functional quality of outdoor spaces

Taylor demonstrates exceptional attention to detail in all aspects of grounds maintenance. They are constantly seeking new ways to enhance the beauty and functionality of our outdoor spaces. From implementing sustainable landscaping practices and introducing native plant species to designing rooftop gardens and more efficient irrigation systems, their innovative ideas elevate the aesthetics of our campus and position the university as a model in environmental sustainability. Moreover, Taylor proactively identifies and addresses potential issues such as pest infestations, plant diseases, and erosion before they can disrupt the campus environment. Taylor is an invaluable member of our groundskeeping team, and their contributions were pivotal to UNC-Chapel Hill being recognized as one of the Most Beautiful Colleges in America by Architectural Digest.

Is the employee:

- **Exceeding Expectations**
- **Meeting Expectations**
- **Not Meeting Expectations**

**Share your answers
via the Poll**



Activity 3: Rating Case Study

Groundskeeper

Goal: Maintain and enhance the aesthetic and functional quality of outdoor spaces

Taylor demonstrates **exceptional** attention to detail in **all aspects** of grounds maintenance. They are **constantly seeking new ways** to enhance the beauty and functionality of our outdoor spaces. From implementing sustainable landscaping practices and introducing native plant species to designing rooftop gardens and more efficient irrigation systems, their **innovative ideas** elevate the aesthetics of our campus and position the university as a **model** in environmental sustainability. Moreover, Taylor **proactively identifies and addresses potential issues** such as pest infestations, plant diseases, and erosion before they can disrupt the campus environment. Taylor is an **invaluable** member of our groundskeeping team, and their **contributions were pivotal** to **UNC-Chapel Hill being recognized** as one of the Most Beautiful Colleges in America by Architectural Digest.

Exceeding Expectations

What are the considerations if your team member is not meeting expectations for a goal?



Scheduling the Performance Conversation



Inform
the employee



Schedule
the meeting



Prepare
documentation



Plan for
the conversation

Tips for a Meaningful Appraisal Conversation

1

Create a positive atmosphere

2

Encourage open dialogue

3

Review agenda

4

Discuss achievements and performance

5

Explore employee's self-assessment

6

Address areas for development

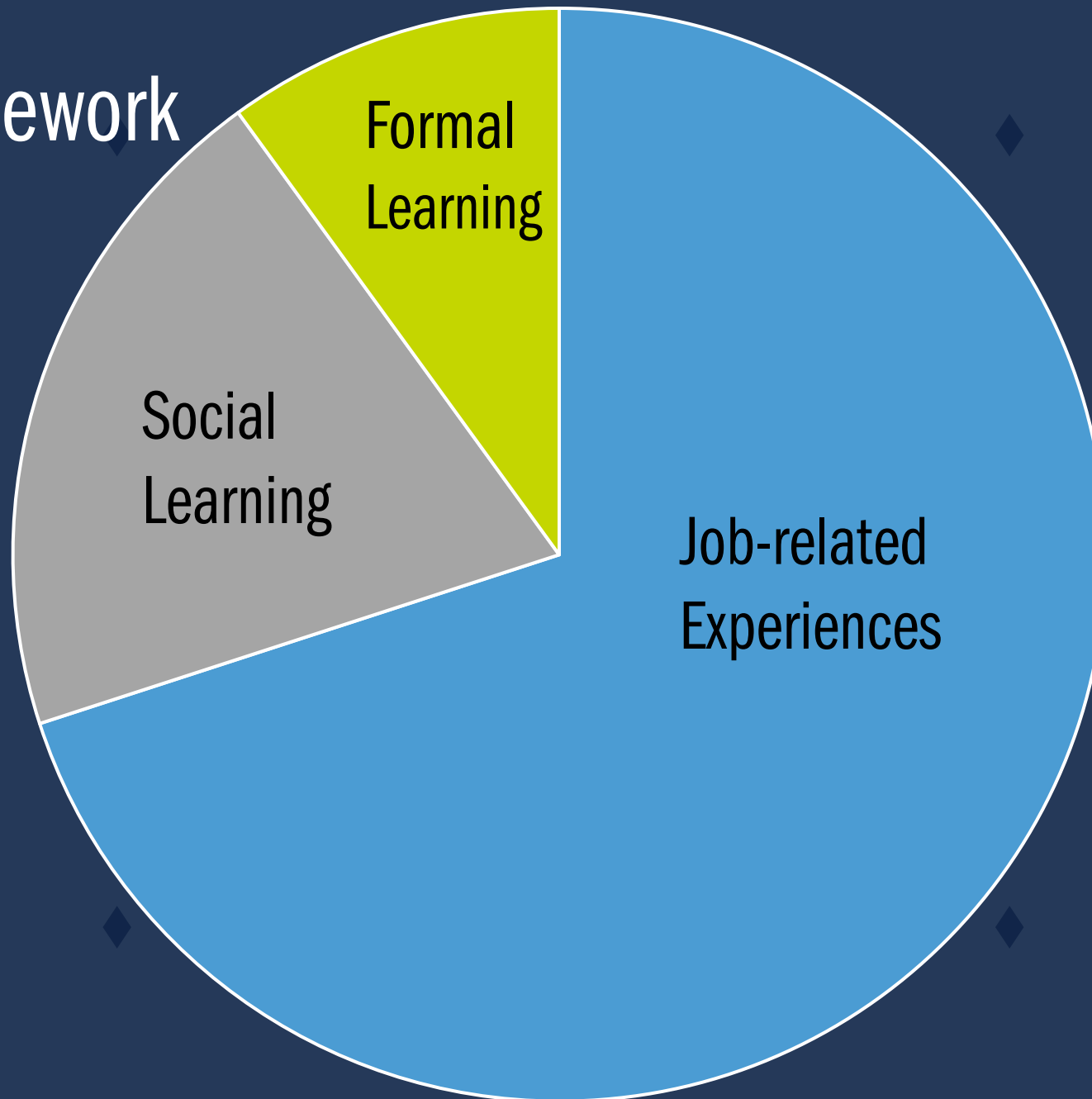
7

Discuss support and developmental needs

8

Set future goals

70-20-10 Framework



Concluding the Appraisal



Summarize
key points



Express
appreciation



Document the
discussion



Schedule
follow-up

Post-Appraisal Actions



Implement
agreed-upon actions



Monitor progress



Update
documentation

Performance Management



At Carolina, Performance Management is an ongoing partnership between employees and managers to provide our employees with timely performance feedback to enable success in their roles and to support our employees' professional development and career growth. Our performance management process gives employees a comprehensive review of their performance and shows how their work aligns with the initiatives of the [University's strategic plan](#).

[Key Dates](#) [Policies](#) [Eligibility](#) [Carolina Talent](#)

[Performance Hub](#) [Learning Resources](#) [Help & How-tos](#)



[Goals](#)



[Self-Assessment](#)



[Annual Appraisal](#)



[Performance Planning](#)

Performance Management Goals



Goal-setting is a key part of performance planning. This page has particulars about what goals are and how to write them. See the [Performance Planning](#) webpage for things to consider when mapping out goals.

[About](#)[Institutional Goals](#)[Individual Goals](#)[Goal-Setting](#)[How to Write a Goal](#)[Rating Goals](#)[Goals in Carolina Talent](#)[For Managers](#)[Learning Resources](#)[Help](#)

About

Goals are the foundation of performance planning and enabling employees to be successful in their roles. Goals provide a **clear direction and focus for employees** and ensure that their efforts are aligned with the [University's strategic plan](#). When used effectively, goals provide purpose, help prioritize efforts, track and measure progress and create a sense of accomplishment when achieved.

There are 3 types of goals that we focus on for performance:

- **Individual performance goals.** These represent the performance expectations of your role and may include specific improvements and actions to

[PM Toolkit](#)[Back to top](#)

Annual Appraisal Process

Performance Management Annual Appraisal Process



At Carolina, the annual performance appraisal reflects on the progress of the previous year. To support performance development and success in their role, SHRA and EHRA Non-Faculty employees who work more than six months during the performance appraisal cycle are required to have an annual performance review. All appraisal tasks are completed online through Carolina Talent Performance.

[About](#)[Eligibility](#)[Ratings](#)[Employee Competency Assessment](#)[Key Dates](#)[Appraisal in Carolina Talent](#)[For Managers](#)[Learning Resources](#)[Help & How-tos](#)

About

When evaluating performance, it's important for employees and managers to consider *what* the employee achieved and *how* they achieved it.

- The *what* includes the specific results that were achieved, the positive outcomes, and the broader impact.
- The *how* includes consideration for our organizational values and the competencies and behaviors that create our organizational culture.

Performance Management

Performance Planning



Performance planning is a forward-looking approach to how we work strategically to support the success of our employees to ensure that Carolina continues to be a world-class university and research institution. Managers and employees work collaboratively to define clear goals and to create a plan to meet those goals, identifying the support employees may need to grow their skills and advance in their careers at Carolina. Performance planning boosts the performance and productivity of our teams, powers our organizational goals and unleashes our employees' engagement and motivation.

[About](#)[Performance Conversation](#)[Performance Plan](#)[Development Plan](#)[Goal-Setting](#)[Planning in Carolina Talent](#)[For Managers](#)[Learning Resources](#)[Help](#)[Performance Season](#)[Back to top](#)

Performance Management Help & How-tos



This page provides an overview of important resources, key dates, tools and learning opportunities for employees and managers during performance season.

[Log in to Carolina Talent](#)

[Performance Hub](#)

[New Webinars](#)

[Key Dates](#)

[Learning Resources](#)

[How-to Quick Links](#)

[Office Hours](#)

Carolina Talent Performance Hub

With step-by-step guides, FAQs and additional support to help you complete your tasks in Carolina Talent Performance, this new platform is built to ensure that you can find answers easily and efficiently. The Carolina Talent Performance Hub is designed to provide helpful solutions accessible anytime and a user-friendly experience that facilitates self-service and learning.

[Carolina Talent Performance Hub](#)

If you need technical help with Carolina Talent Performance, **submit a help request** via the [Carolina Talent Service Request in the UNC help portal](#).

Help & How-tos

[how-tos webpage](#)

- Carolina Talent Performance Hub
- All content
- Space settings
- CONTENT
 - Getting Started
 - Carolina Talent Key Terms
 - Navigating Though Carolina Talent ...
 - My Profile/Team
 - Employee Snapshot (view goals, pr...
 - Managing Goals (via Goals Menu)
 - How to View My Goals/ Team Goals
 - How to Create Goals
 - How to Copy Previous Goals
 - How to Edit, Cancel or Delete Goals
 - How to Assign a Goal to Multiple E...
 - How to Approve Pending Goals (M...
 - How to Export/Download Team Go...
 - Development Plans
 - Completing Performance Tasks
 - How to Add/Remove a Co-Planner ...
 - Performance Plan Task
 - EHRA-NF/SHRA Annual Appraisal T...
 - SHRA Probationary Review Task
 - SHRA Employee Competency Asses...
 - How to Launch Off-Cycle Task
 - Delete/Remove Task
 - Resources
 - Frequently Asked Questions (FAQs) ...
 - How to Submit a Help Desk Ticket
 - Quick Reference Cards (QRC)
 - Share Your Feedback or Suggestions

Carolina Talent Performance Hub Home



Find how-to articles and troubleshooting guides for Carolina Talent Performance

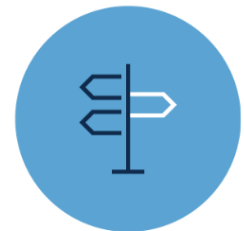
About the Hub

The Performance Hub provides step-by-step guides, FAQs and additional support to help you complete your tasks in Carolina Talent Performance. This platform is designed to provide helpful solutions that are accessible anytime and a user-friendly experience that facilitates self-service and learning.

To ensure that you can find answers easily and efficiently, we aim to continuously improve your performance experience by adapting the Carolina Talent Performance Hub based on your feedback. Be sure to visit the Hub's [Feedback/Suggestion page](#) to share your experience.

Browse by Topic:

Getting Started



- Carolina Talent Key Terms
- Navigating Though Carolina Talent Performance
- My Profile/Team
- Employee Snapshot (view goals, previous documents, and more)

Managing Goals (via Goals Menu)



- How to View My Goals/ Team Goals
- How to Create Goals
- How to Copy Previous Goals
- How to Edit, Cancel or Delete Goals
- How to Assign a Goal to Multiple Employees
- How to Approve Pending Goals (Managers)
- How to Export/Download Team Goals
- Development Plans

Completing Performance Task



- How to Add/Remove a Co-Planner to a Task
- Performance Plan Task
- EHRA-NF/SHRA Annual Appraisal Task
- SHRA Probationary Review Task
- SHRA Employee Competency Assessment (ECA)
- How to Launch Off-Cycle Task
- Delete/Remove Task

Performance Hub

Carolina Talent Performance Hub

Learning Resources



Learning Resources

To support employees and managers this performance season, here are some on-demand learning resources on key topics.

For all performance-eligible employees

Completing the Self-Assessment

- [Setting the Stage for a Successful Performance Conversation Webinar Recording](#) (83 minutes)
- [Slides for Setting the Stage for a Successful Performance Conversation](#) (pdf)

Goal-Setting

- [Setting Team and Employee Goals using SMART Methodology](#) | LinkedIn Learning (55 mins)
- [Setting Goals Quick Reference Guide](#) (PDF, Onyen login)

Growing Your Career

- [Setting Career Goals at UNC](#) | e-learning (30 mins)
- [Defining and Achieving Professional Goals](#) | LinkedIn Learning (27 mins)

Feedback

- [Giving and Receiving Feedback](#) | LinkedIn Learning (28 mins)

For managers

Goal-Setting

- [Performance Management: Setting Goals and Managing Performance](#) | LinkedIn Learning (20 mins)
- [Setting Team and Employee Goals using SMART Methodology](#) | LinkedIn Learning (55 mins)
- [Setting Goals Quick Reference Guide](#) (PDF, Onyen login required) | Carolina Talent

Giving feedback

- [Giving Performance Feedback](#) | e-learning (30 mins)
- [Giving Performance Feedback Quick Reference Guide](#) (PDF, Onyen login required) | Carolina Talent
- [Delivering Employee Feedback](#) | LinkedIn Learning (30 mins)

Performance Management Resources

Info, Tips & Timelines

- [Performance Management HR Website](#)
 - [Self-Assessment webpage](#)
 - [Performance Appraisal](#)
 - [Performance Planning](#)
 - [Goals](#)
 - [Help and how-tos webpage](#)

Carolina Talent How-tos

- [Carolina Talent Performance Hub](#)

Questions

- [Drop-in office hours](#)
- [Your HR Representative](#)

Learning

- [E-learning and Quick Reference Guides](#)

Other Resources

- [SHRA/EHRA-NF Salary Increases Guidelines](#)
- [EHRA-NF Performance Bonus](#)
- [Types of Rater Bias](#)

Support

- [School/Division HR Offices - UNC Human Resources](#)
- Technical support: [Submit a help ticket](#)
- Program support:
Email the [Performance Management Team](#)
- [Employee and Management Relations - UNC Human Resources](#)
- [UNC Human Resources](#)

Share Your Feedback

Please share your thoughts on this session.

*Your feedback is **important** and will be used to **improve** future offerings.*

Webinar Evaluation



QUESTIONS?