



Performance Management

Manager Q&A

How does the university approach the concern that performance evaluations are perceived as a means to highlight employee areas for improvement, rather than supporting performance-based salary advancements?

The appraisal is an opportunity for open and honest conversation about performance. The vast majority are positive. Managing performance is meant to be communication tool. Performance evaluations play a crucial role for employees, even when there's no guarantee of increased compensation. Effective performance reviews foster employee self-reflection, increase engagement, help identify strengths and areas of growth, and improve communication between managers and reports.

What strategies can be recommended to prevent contrast bias while managing several employees who hold identical positions?

To counter contrast bias in employee evaluations, it's essential to judge employees based on predefined and communicated standards. For example, if achieving 10 units is the expectation and 13 units is exceeding expectations, both employees reaching 10 and 12 units meet expectations. Avoiding contrast bias means not comparing employees against each other but against these clear benchmarks, ensuring a fair evaluation based on individual performance against set goals.

How do we handle a rapidly changing project in which new task expectations are continually emerging, so the original job descriptions become outdated?

Typically position descriptions are reviewed during this time. If changes need to occur during the performance year, please work with your departmental HR to assist in updating. If the changes are needed more on the performance goals, you can update those at any time during the year by accessing the employee's goals in Carolina Talent. Visit the [Performance Hub](#) to learn how to view/edit team goals.



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I took over managing an employee recently for someone who left the University. How do I find the goals and assess someone with few experiences/observations?

As long as you are the supervisor in ConnectCarolina, you should have access to the employee's "Snapshot" in Carolina Talent. This will include their goals for this year and past reviews. Another potential option would be to ask the second level supervisor or the employee's past interim supervisor to serve as a co-planner on the appraisal, as they may have more feedback to provide from the time before you took over supervision.

How should one address an employee who meets only the minimum requirements of their job, in order to encourage a higher level of performance and engagement?

One tool that is available is clearly defining what exceeding expectations would be. We advise documenting this when creating the goals. Many employees want to exceed the expectations and this will assist in having the conversation about the "more" you are wanting from them.

How should one approach scenarios where an employee has fully mastered their role, leaving no room for further learning or advancement within the job? This situation might necessitate a career move, either within or outside the organization, especially when the nature of their current position offers no additional challenges or opportunities for improvement.

Development Plan is key for career advancement, focusing on new skills and specific job-related achievements. Performance goals provide direction for these achievements. Managers play a critical role in employee growth, helping expand networks and explore new opportunities, thus fostering a culture of advancement and talent retention. Consulting with Departmental HR can further support goal setting and career development plans.

Why am I receiving numerous alerts and tasks when there isn't a review pending? This is causing confusion on my end.

Our advice is to [submit a help ticket](#) to the HRIM Business Analyst team to review more in-depth. Here is the link to create the ticket.



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As someone who served in an interim supervisory role for 8 months, with a permanent successor appointed at the end of February 2024, how can I access the performance reviews for the six employees I was overseeing, now that they technically no longer report to me?

If you are required to assist, you can be added as a co-planner by the current supervisor or create a help ticket for OHR to add you. Given that you managed these employees for 3/4 of the performance cycle, we would encourage you to reach out to the new manager and offer to share your feedback on their performance and development areas.

If the review, performance plan, and assessments are completed before April 30th, is it permissible to hold review meetings with employees ahead of the HR checkpoint in May?

Managers can definitely meet with the employee about the Performance Plan and the ECA. However, outside of extenuating circumstances, we would not advise meeting about the appraisal until after May 20. This is because the performance appraisal goes through an HR Checkpoint review prior to it being officially completed (May 1 through May 20), and if any updates or changes are made to the appraisal during that time, it could potentially be awkward to have to meet with the employee again to go over the finalized version of the appraisal. If you have any questions, please contact Jessica Procel or Employee and Management Relations.

If an employees' role changed and transferred from DHHS (12 yrs of employment) and started with UNC-CH in a SHRA position on 11/2023, is there a probationary review needed?

It would depend on if there was a break in service. You can email us at performance_management@unc.edu.

How can one effectively communicate to an employee that they have not met expectations, especially when there haven't been many opportunities for ongoing performance discussions over the past year, potentially leaving the employee unaware of their performance issues?

We suggest reaching out to your HR department and the Employee and Management Relations team for guidance on addressing this matter. Generally, if an employee is unaware of their performance shortfall, it's difficult for them to make necessary improvements. Your willingness to discuss this openly is commendable, as it reflects a commitment to growth and learning, both for yourself and your team.



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Can an employee receive Exceeding Expectations during the past Performance period due to above and beyond performance on a specific project and go back to Meeting Expectations during the next Performance period.

Yes, an employee's performance must be rated by how they performed during that specific performance year, from April 1-March 31, based upon the expectations that they were given for that performance cycle.

I would be happy to hear tips on how to handle these conversations with the employees are not great communicators. Some of the previous conversations I have had were one-sided because the staff member just didn't have much to share either related to their own goals or discussing performance.

A helpful tool in Carolina Talent is that employees can enter comments throughout the year in the Goals section. This can assist in the communication of progress during the year. Also, consider telling your employee in advance that you are looking for a two-way dialogue and that their perspective, feedback and suggestions are important to you. It's possible that if you share this before the meeting and actively listen during the meeting, they will begin to share more openly with you. We've included some thought-starter questions for your employee on the [performance webpage](#).

Are employees who receive "not meeting expectations" still eligible for scheduled state raises?

That generally depends on what the guidelines are for that specific legislative state increase (LSI). In the past, all employees (even those with "not meeting expectations") were still eligible for the LSI because it was an increase that applied across the board. For increases that do not apply across the board, such as the Annual Raise Process (ARP), those who have "not meeting expectations" are typically not eligible for those increases, based on the guidelines that come out from the UNC System Office.

What is needed for the new employee less than 6 months?

If they are SHRA there are probationary reviews. If they are EHRA-NF then there is not a required task for them, but the manager could initiate a mid-cycle review if they desired.



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Suggestions for moving from team member to supervisor mid-year and changing the tone of the relationship?

There are trainings for this that may be helpful! Check out "Moving from Peer to Manager" that is offered through Organization & Professional Development in OHR. In addition, [this article](#) offers terrific advice for individuals who are making the shift from peer to manager.

What are qualifications for a performance bonus?

Information about the performance bonus is on the [HR website](#).

Where to find role/position/pay grade for employees that need to transfer from UNCH to UNC.

Your dept HR rep should be able to assist with this. UNC Hospitals/Healthcare employees are completely separate from UNC-Chapel Hill and we do not have access to their information.

If SHRA employee, what is needed for the new employee less than 6 months?

There should be a probationary review task to complete in CarolinaTalent for that employee.

Outside of LSI and ARP, what is the process called to ask for a salary increase?

To request a salary increase for an employee you supervise, you should reach out to your dept HR rep and they will get that started with you!

Can second level supervisors be added as co-planners?

Yes, generally a second-level supervisor can be a co-planner on a performance appraisal.

What are the differences between the Legislative Salary Increase (LSI) and the Annual Raise Process (ARP)?

The Legislative Salary Increase (LSI) is funded by the Legislature and is generally an across the board increase of a set percentage for everyone. The Annual Raise Process (ARP) is discretionary, it may be funded by the legislature to be administered by the Board of Governors (BOG) where everyone does not get the same amount and some do not receive anything. The LSI and ARP are not guaranteed or required to occur every year, and can have different guidelines every time one or both occur.



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What is the Employee Competency Assessment (ECA)?

The Employee Competency Assessment (ECA) is a rating of the level of the knowledge, skills, and abilities they have demonstrated on the job. Performance relates to how well they met their individual goals and performance objectives. Also, ECA ratings linked to salary administration, so changes in competency or overall changes may indicate a salary increase is allowed in accordance with the [Career Banding Pay factors](#).

Is there a training program available in Carolina Talent specifically designed for new managers?

We currently do not offer system training for Carolina Talent. Our new website [Carolina Talent Performance Hub](#) is our step-by-step self-service tool to help learn to navigate Carolina Talent and complete your task. If there is something more you are looking for you can request that via an email to performance_management@unc.edu

Would be great if Carolina Talent had a 1:1 notes feature that compiled or fed into the annual evaluation to make the April performance review less fraught and more streamlined. I also spend a large amount of time in April on performance evaluation. If the annual eval is meant to be summative and our regular check-ins are meant to be formative, it would be great for Carolina Talent to help us facilitate that year-round in a more comprehensive manner.

Thank you for the feedback. Currently, employees and managers can add comments and progress updates on the Performance > Goals Pages throughout the year. In addition, we are looking at new features in Carolina Talent as they become available.

Is it necessary to review the entire job description to accurately assess scenarios and understand what qualifies as "exceeds expectations"?

Goals ought to be established clearly at the "Meeting Expectations" level, along with detailed criteria for what constitutes "Exceeding Expectations." For more clarity and examples, we encourage visiting our [Performance Help Pages](#). Also, we'll ensure to incorporate explicit meets/exceeds criteria in our examples for future webinars to facilitate better understanding.



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I heard y'all suggestion seeking feedback from other staff/campus partners to contribute to the performance review. I'm thinking about "360 Reviews" private companies do which I would love to see more of at UNC. How would you suggest seeking this feedback from others?

In terms of a 360 assessment, we would not recommend administering a 360 assessment as a means of gathering performance feedback. In our experience, 360 assessments are most effective when they are used as a development tool, and not a means of evaluating performance with the potential to impact pay or promotion opportunities. Developing a 360 takes intention, effort and time and there are a lot of factors to consider. There are also risks to not doing this well, including eroding employee morale, engagement, and team trust. The Organizational and Professional Development Team has experience with developing and administering 360 assessments, and we would be glad to share our experiences with you. Please reach out to [Kathleen Guerra](#).

I was recently promoted to supervisor in my unit. Will I have access to past performance/appraisal documents for my new reports? If so where, would I find them?

Managers have access to direct and indirect report performance documents over the last 3 years in Carolina Talent. You can see them in Employee Snapshot. Check out this link on Performance Hub for [step-by-step instructions](#).