

SHRA Performance Appraisal Policy

General Timeline of Performance Cycle

Time Period	Preparing Annual Appraisal for the <u>Ending</u> Performance Cycle	Preparing Performance Plan for the <u>Beginning</u> Performance Cycle
Mid-March to Early-April	<ul style="list-style-type: none"> ➤ Supervisors may have initial conversations with employees to review accomplishments from the current performance cycle. ➤ Supervisory teams may have initial discussions about annual appraisals and/or set a schedule to discuss and complete evaluations. ➤ Supervisors could also request an employee self-evaluation, solicit feedback from customers or others who work with the employees, or review performance documentation collected throughout the cycle. 	<ul style="list-style-type: none"> ➤ Supervisors may have initial conversations with employees about individual goals and talent development goals for the next performance cycle. ➤ Supervisory teams may begin having discussions about strategic goals or priorities for the next cycle.
Early-to-Mid April	<ul style="list-style-type: none"> ➤ Supervisors use the ratings calculator to begin estimating ratings for their staff and/or begin drafting annual appraisals. 	<ul style="list-style-type: none"> ➤ Supervisors begin drafting individual goals for their employees.
Mid-to-Late April	<ul style="list-style-type: none"> ➤ Supervisory teams meet for calibration sessions to compare ratings for employees in similar positions and to ensure consistency, fairness, and appropriate justification for ratings. 	<ul style="list-style-type: none"> ➤ Supervisory teams meet for calibration sessions to discuss clarity of expectations on institutional goals, discuss strategic priorities, set performance expectations for individual goals, and assign weights to institutional and individual goals.
Late-April to Early-May	<ul style="list-style-type: none"> ➤ Supervisor completes draft of annual appraisal and sends to manager. ➤ Manager reviews annual appraisal and returns to supervisor. 	<ul style="list-style-type: none"> ➤ Supervisor completes draft of performance plan and sends to manager. ➤ Manager reviews performance plan and returns to supervisor.
Early-May to Mid-May	<ul style="list-style-type: none"> ➤ Supervisor meets with employee to review annual appraisal (may send to the employee in advance for review prior to meeting). ➤ Supervisor and employee sign annual appraisal. 	<ul style="list-style-type: none"> ➤ Supervisor meets with employee to review performance plan (may send to the employee in advance for review prior to meeting). ➤ Supervisor and employee sign performance plan.
Mid-May to Late-May	<ul style="list-style-type: none"> ➤ Annual appraisal is completed and entered into system of record. 	<ul style="list-style-type: none"> ➤ Performance plan is completed and entered into system of record.