The annual performance cycle for **permanent SHRA (SPA) employees** will end on March 31st this year.  All reviews for permanent SHRA employees must be completed and sent to me by **Friday, April 19th**.  Please carefully read the information below which should help you with the process.

**NOTE:**  **A separate email communication will be sent out to supervisors with information about EHRA (EPA) Non-Faculty performance reviews, which are not due at this time.**

**Between March 31 -  April 19 please complete the following:**

* **Complete Annual Appraisal Form and  Employee Competency Assessment**

If you would like for me to review and provide feedback and/or suggestions prior to meeting with the employee, please feel free to email a draft to [angela\_lyght@unc.edu](mailto:angela_lyght@unc.edu).

* **Develop the Performance Plan for 2018-19 (formerly known as the Work Plan)**

The performance plan contains individual goals for the employee set by the supervisor and institutional goals set by the Office of Human Resources.

* **Performance Review**

Meet with each direct report to hold an annual appraisal conference.

* **Enter Performance Ratings in ConnectCarolina**

Supervisors are responsible for entering the appraisal and ECA rating by April 30, 2019.

**Frequently Asked Questions:**

1. Q: Why am I receiving this email?

You are receiving this communication because you are the immediate supervisor of one or more SHRA employee(s) who require an annual appraisal:

1. Q: What period is covered in this appraisal?

The performance year cycle runs from April 1, 2018 to March 31, 2019.

1. Q: Who is subject to the SHRA annual performance review?

Annual performance appraisals must be completed for **all** SHRA permanent and probationary employees (full-time, part-time, and time-limited) who are regularly scheduled to work 20 or more hours each work week and employed by the university or another state agency for at least six (6) months.

1. Q: An employee changed supervisors/transferred positions in the past year. What do I do?

For employees who changed supervisors or transferred from another department/state agency during 2017/18 performance year, the current supervisor may request a mid-cycle review or its equivalent from the previous supervisor for the current supervisor’s consideration in determining the overall rating for the employee this cycle.

1. Q: Which forms should I use?

You will be utilizing the Annual Appraisal Form and the Competency Assessment form to evaluate performance and competency level of each SHRA employee in 2018/19.

1. Q: How do I know whether an SHRA employee is in ‘probationary’ or ‘career’ status?

Probationary employees are all new permanent SHRA employees until they reach the ‘career’ status (12 months after their hire date).  However, please keep in mind that employees who transferred from another position within the university or another state agency may already be in ‘career’ status. If in doubt, please contact me at [angela\_lyght@unc.edu](mailto:angela_lyght@unc.edu) or 919.962.0087.

1. Q: What do I need to do in preparation for the performance review meeting?

* Please make sure that the employee’s job description exists and is up-to-date.  You may contact your HR Consultant to receive the job description:  <https://faopharmacy.unc.edu/human-resources/the-hr-team/>
* Consult the employee’s existing performance plan for a list of current institutional and individual goals.
* Take an opportunity to familiarize yourself with the [SHRA performance appraisal policy](https://hr.unc.edu/files/2017/07/SHRA-Performance-Appraisal-Policy-04-2016.pdf).
* For any ratings of ‘Not meeting expectations’ or ‘Exceeding expectations’, please include detailed explanation/examples in the ‘Comments’ section of the performance review form.
* All supervisors are strongly encouraged to reach out to other people who frequently interact with your SHRA employee(s) to seek feedback on their performance. Please make sure all feedback from internal and external stakeholders is kept anonymous and it is discussed with the employee during the performance review meeting.  I have attached a list of assessment questions which you may find helpful when reaching out to people who interact frequently with your employee(s).  Feel free to have the employee complete the assessment as well. We recommend you create a this assessment in Qualtrics.  <https://software.sites.unc.edu/qualtrics/>
* Make sure to use the correct list of employee competencies for the Employee Competency Assessment (ECA). If in doubt, consult section 7 of the employee’s job description or refer to [SHRA Competency Profiles](http://oshr.nc.gov/state-employee-resources/classification-compensation/comp-profiles).

1. Q: Who should review and approve the Annual Appraisal and the Employee Competency Assessment (ECA) form?

Both the performance review and the ECA forms must be signed by you and the employee. The form should also be reviewed by the second level supervisor PRIOR TO MEETING PRESENTING TO THE EMPLOYEE.  The second level supervisor should sign after your meeting.

1. Q: What is the submission process for completed forms?

A hard copy of the completed and signed forms should be kept with the supervisor of an SHRA employee.  The employee should also receive a copy of the completed and signed forms. **Please remember to email a PDF version of all forms to me at** [**angela\_lyght@unc.edu**](mailto:angela_lyght@unc.edu).

1. Q: I see a deadline of April 30th from OHR.  Why am I asked to have this completed by April 19th?

OHR is asking that all reviews be completed by April 30th, therefore I have set an internal School deadline for April 19th.  This will give time me to review all appraisals for accuracy and to assist you should you run into challenges.

1. Q: What other resources are available to supervisors of SHRA employees?

* [Performance Management Forms](https://hr.unc.edu/managers/performance/) (All forms)
* [Performance Management Policies (SHRA)](https://hr.unc.edu/files/2017/07/SHRA-Performance-Appraisal-Policy-04-2016.pdf)
* [SHRA Competency Profiles](https://oshr.nc.gov/state-employee-resources/classification-compensation/comp-profiles)
* [Entering Employee Rating in ConnectCarolina](https://hr.unc.edu/files/2017/08/Entering-Employee-Ratings-in-ConnectCarolina.pdf)

All questions regarding the performance review process, ratings, employee competency assessments, and the forms should be directed to me at [angela\_lyght@unc.edu](mailto:angela_lyght@unc.edu) or 919.962.0087.