

Arts & Sciences Managers' Meeting Minutes

July 9, 2014

Speakers

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New SPA Management Program

Program Philosophy of Performance Management Program

- Performance management is a communications system developed to help employees succeed.
- It is composed of work plans, work planning conferences, day-to-day observations and documentation, performance appraisals, development activities, and counseling sessions.
- Program cycle is July 1 to June 30.

Roles and Responsibilities

- It is up to the employee to actively participate and own the work while asking questions and keeping the supervisor informed.
- It is the supervisor's responsibility to have clarity in expectations and honest in appraisal and investing time upfront and using available resources.

The Performance Management Program is used for discussing issues while integrating duties with unit objectives and setting the baseline for ongoing supervision.

It is also a valuable tool when interacting with other policies, such as classification, compensation and hiring; discipline/grievances; and layoffs.

Goals of Program Revision

- Make the process clearer and less cumbersome
- Create standardized categories for evaluation
- Increase accuracy and defensibility of ratings
- Promote honest and clear communication

Program Structure

- Work plan – setting performance and developmental goals
- Work planning session – review of goals, position description, and expectations
- Performance appraisal – rating performance, organizational values and the overall rating for an employee's performance

Mid-cycle review

- Required if employee received a below good (BG) or unsatisfactory (U) overall rating or rating of “not meeting expectations” on a goal/value on last appraisal.
- Divisions/schools/departments may opt to require mid-cycle reviews for all employees

Annual performance appraisal

- Due within 60 days prior to end of performance cycle (between May 1 and June 30)
- Must hold one on one review session with each employee
- Ratings must be reported to the State by June 30
- Employees should receive a rating of “not meeting expectation” for goals/values relevant to disciplinary action
- Based on other ratings, employee may receive a higher oval rating.
- If the employee has sustained a BG/U overall rating or not meeting expectations for a goal/value for two or more performance reviews or spanning at least six month then this is an incident of unsatisfactory job performance that is itself cause for disciplinary action if no other action has been taken to address the issue.

Probationary Employees

- State requires “documented” reviews with probationary employees on a quarterly basis
- For these employees use the closest fiscal quarter for review (September, December, March) and the annual review (June)
- Not required to provide overall ratings or comments; simply use review sessions and check off when they occur with employee

Next Steps

- Review current position descriptions for accuracy
- Set performance goals for 2014-2015 performance cycle
- Meet with each employee (After employee training) to clarify expectations for performance goals and organizational values
- Define/update/create additional resources as needed
- Due in September

ARP/Salary increases

- Please see email/memo about possible ARP sent 7/8/14 for more details
- Please make sure you submit your request for any 7/1/14 actions, such as adding and removing secondary stipends, return from leave of absences, etc NOW. They need to be approved by payroll by 7/15/14 to be included in the possible ARP
- You will not need to attend training, if we have ARP we will send out a spreadsheet for you to complete and we will enter the data. It will be a very quick turnaround (approx. 3 days) so please be aware this may be coming. If we don't receive the budget by the 15th of July we will most likely not have ARP until November (after go-live)
- Please be aware that we have submitted 7/1/14 planned salary increase actions for retentions, promotions and Chair appointments. We are still waiting for approval from GA for some that are over 10% and are working to get those approved for July paychecks but it may be August, we'll let you know

Deposits and Startup & Commitment Allocations

- Pertaining to email sent regarding policy on depositing gifts on 7/8/14. Please make sure any gifts you received are sent to Larry Johnson in the Arts and Sciences Foundation, if you know how to fill out the transmittal form from the back please include that, if not, a note explaining what it's for is sufficient. Gifts should not be deposited at the cashier's office.
- Make sure you are in touch with your Budget Analyst regarding completing any startup spreadsheets for new faculty starting 7/1/14, we will be starting the allocation process soon. We hope to have the transfers complete by 8/31. If you know the source of your funds and the budget hasn't been received yet you can spend now because budget controls are lifted until 9/30/14.

Connect Carolina Updates

- If you cost code in InfoPorte for July 2014 until go-live it will not be transferred over and will need to be done again (you may want to wait) once ConnectCarolina goes live
- We are starting training for train the trainers this week and will continue through August, the schedule for your training will be sent out in August but will take place in September, we have created a mandatory Chartfields 101 class as a prerequisite for all classes
- We have added a Connect Carolina resource section on the College Intranet, also note that you can visit ccinfo.unc.edu to see additional information about ConnectCarolina
- Please be patient with us as we continue to request information for ConnectCarolina go-live, we apologize the quick turnaround and thank you for your hard work getting us the information we request
- It's finally here! We plan to send out the crosswalk chart of accounts

for your departments in PDF and Excel format, we will have some action items (such as reviewing for active accounts, ensuring accuracy, and renaming auxiliary accounts description) but we hope you will find them helpful for preparing and using the system go-live

**HR
Announcements**

- Our office will update the Chair reporting relationships after the 7/15/14 push
- We will also work to ensure that the listservs are updated