

I have a lot of useful information already in my performance plans for my employees. Am I supposed to throw this information away?

No. There is no need to throw away useful information. Although many items from old performance plans may not show up on the new performance plans, the existing information can be used as a job aid to supplement to the performance plan, along with other resources that provide performance expectations, such as department policies and procedures (e.g., a department leave request procedure or attendance policy), research protocols, manuals or other similar documents.

Throughout the performance cycle, the supervisor should provide additional clarification about performance expectations and record these, for example, through email or by adding the information to existing guides.

If it isn't in my performance plan, can my supervisor require me to do it?

Yes. The “Team-Oriented” & “Collaboration & Teamwork” institutional goals on the performance plans set a standard expectation that all employees perform “additional duties when team members are absent, during times of increased workload, or as otherwise requested by management to meet business needs.”

The performance plan has never been expected to include every possible performance expectation for employees. It would be impossible to spell out every aspect of performance (quality, quantity, timeliness, delivery, compliance, etc.) for each task performed by the employee.

The institutional goals section provides performance expectations required campus-wide for all aspects of an employee’s work. The individual goals section of the performance plan defines only the most significant job expectations for the current performance cycle.

Most position descriptions include language that other duties may be assigned as needed, and supervisors are encouraged to include that language in each position description.

Institutional Goals

The institutional goals have been developed as standing performance and behavioral expectations that apply to all employees. Both sets of institutional goals have been developed to cover the entire scope of an employees’ performance in his or her role.

→ [SHRA Institutional Goals](#)

This set of goals was developed by the General Administration (GA) of the University of North Carolina System for all university SHRA employees. [Click here for expanded versions of these goals.](#)

→ [EHRA Institutional Goals](#)

This set of goals was developed by the UNC Wilmington campus leadership in collaboration with UNCW’s Office of Human Resources to best reflect the roles and responsibilities of EHRA non-faculty employees in conjunction with the Strategic Plan. [Click here for expanded versions of these goals.](#)

How is this different from the old form?

Old Form Organization

The old evaluation form is organized by job duty and/or competency. From here, a supervisor evaluated the employee on how he or she performed each duty.

Position Description	Work Plan
Job Duty 1	Accuracy; Deadlines; Customer Service
Job Duty 2	Accuracy; Deadlines; Customer Service
Job Duty 3	Accuracy; Deadlines; Customer Service

New Form Organization

The new appraisal form is organized by institutional goals, which instead measure *how* an employee performs in every aspect of his or her job.

Institutional Goal	Job Duty
Expertise	Job Duty 1; Job Duty 2; Job Duty 3
Accountability	Job Duty 1; Job Duty 2; Job Duty 3
Customer Orientation	Job Duty 1; Job Duty 2; Job Duty 3

How do institutional goals relate to job duties?

Each job duty in the position description comes with performance expectations that are described in the institutional goals (for example, level of accuracy, quality of analysis, efficiency of process management, the impact of absenteeism, how interactions with others affect the work produced, etc.). However, instead of ratings being given for each job duty, the ratings are given for each institutional goal across all job duties.

So, instead of receiving one rating for all aspects of Job Duty #1 (accuracy, efficiency, compliance and customer service), employees are rated on their expertise (quality of work) for all duties, then rated for their accountability (meeting deadlines, etc.) for all job duties, and so on.

How to talk about Institutional Goals

Use the verbiage provided in the following institutional goal breakdowns to help you communicate the job expectations to your employee. Expand the descriptions to make sense for the employee's role. It often helps if you can give specific examples of what meeting or exceeding expectations looks like for a specific goal; this will help your employee understand how his or her role fits into each institutional goal. Use this fillable worksheet to help you define institutional goals in your area: [SHRA](#) or [EHRA non-faculty](#).

Additionally, take this opportunity to think strategically and share the "bigger picture" of your unit, division, and the university. Use the institutional goals as a platform to discuss how your employee's role fits into the overall goals, mission, and strategic plan of UNCW. By establishing the importance of your employee's role, you are giving the employee a chance to be a connected, empowered, and valued member of the campus community.

Each institutional goal has been defined by three-five descriptive words. The descriptions of the institutional goals on the SHRA and EHRA non-faculty Performance Appraisal Tools have been written at a "meeting expectations" level of performance.



UNCW Full Cycle Performance

SHRA INSTITUTIONAL GOALS

The University of North Carolina General Assembly establishes these institutional goals for all employees covered by the University SHRA Performance Appraisal Policy. These descriptions are written at the “meeting expectations” level of performance. [Click here](#) to see suggested expanded descriptions of the institutional goals. Please consult with the Office of Human Resources if you have any questions regarding the definition or application of these institutional goals.

EXPERTISE

- Precision:** Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession.
- Resourcing:** Makes efficient and appropriate use of materials.
- Innovation:** Regularly looks for ways to improve efficiency or quality.
- Development:** Maintains technical skills and relevant professional credentials.

ACCOUNTABILITY

- Productivity:** Completes required volume of work by established deadlines and stays productive throughout the workday.
- Autonomy:** Generally completes work with few reminders or infrequent oversight.
- Prioritizing:** Takes sufficient, appropriate measures to plan work, prioritize tasks, organize work flows, and set realistic goals.
- Coordination:** Proactively seeks out needed information in order to complete work.

CUSTOMER-ORIENTED

- Clarity:** Actively listens to determine the most effective way to address customer needs and concerns.
- Awareness:** Shows a solid understanding of customer needs, seeks out customer input to better understand needs, and develops ideas to meet those needs.
- Attentiveness:** Follows through on commitments, despite time pressures or obstacles, and listens for and timely responds to customer requests.
- Diplomacy:** Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.

TEAM-ORIENTED

- Collegiality:** Communicates and engages directly, clearly, and tactfully with colleagues.
- Collaboration:** Provides feedback and healthy dialogue on performance and operational issues, as requested. Willingly adapts to change and adheres to decided actions.
- Contribution:** Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs.
- Attendance:** Absences are infrequent and do not place an undue burden on supervisor or colleagues.

COMPLIANCE & INTEGRITY

- Compliance:** Complies with University personnel policies, including prohibitions on harassment, discrimination, and workplace violence, and protects of confidentiality of records.
- Safety:** Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment.
- Ethics:** Chooses ethical action, even under pressure, avoids situations that are inappropriate or present a conflict of interest, holds self and others accountable for ethical decisions, and addresses unethical actions directly.
- Respect:** Appreciates individual and cultural differences, treats all people with dignity and respect.

LEADERSHIP (for supervisors)

- Oversight:** Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing.
- Goal-Setting:** Provides clear objectives that foster work unit development and align with University values and goals.
- Manage Talent:** Provides candid, timely, and constructive feedback on performance and behavior and hires individuals with the qualities and skillsets for success.
- Leading:** Serves as role model. Engenders trust, commitment, and civility.



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EHRA INSTITUTIONAL GOALS

The University of North Carolina Wilmington establishes these institutional goals for all EHRA non-faculty employees. These descriptions are written at the “meeting expectations” level of performance. [Click here](#) to see suggested expanded descriptions of the individual goals. Please consult with the Office of Human Resources if you have any questions regarding the definition or application of these institutional goals.

COMMUNICATION	
Clarity:	Communicates in a manner that clearly and accurately conveys information, is professional and respectful in tone, is suitable for the target audience, and is concise but sufficient in terms of required detail.
Awareness:	Effectively utilizes awareness of self and audience in verbal and/or written expression to communicate with colleagues, clients, supervisory management, and other individuals in the work setting.
Attentiveness:	Actively listens to determine the most effective way to address customer/colleague needs and concerns. Follows through on commitments, despite time pressures or obstacles, and timely responds to requests.
Diplomacy:	Maintains a professional and respectful tone and exhibits diplomacy when dealing with frustrated individuals or during sensitive or confrontational situations.
COLLABORATION & TEAMWORK	
Collegiality:	Communicates and engages directly, clearly, and tactfully with colleagues to establish good rapport. Demonstrates respect for diversity and differing points of view among colleagues.
Collaboration:	Provides feedback and healthy dialogue on performance and operational issues, as requested. Willingly adapts to change and adheres to decided actions.
Contribution:	Makes decisions with others in mind, and willingly performs additional duties when team members are absent, during times of increased workload, or as otherwise required by management to meet business needs.
Attendance:	Absences are infrequent and do not place an undue burden on supervisor or colleagues.
INNOVATION & CREATIVITY	
Creativity:	Regularly implements creative ideas to move the organization, processes, and systems forward.
Innovation:	Introduces new concepts, models, practices, and services that function to enhance operations of the unit, department, or division.
Resourcing:	Makes efficient, appropriate, and creative use of materials.
TECHNICAL/SUBJECT MATTER EXPERTISE	
Expertise:	Demonstrates a mastery of the relevant technical or task-specific expertise necessary to perform assigned duties, which may include knowledge of relevant research methods, technology, procedures, policies or other methods, standards or techniques that are specific to the employee’s position and profession.
Autonomy:	Demonstrates relevant technical or subject-matter knowledge at a level sufficient to perform the duties of the position in an accurate and professional manner without requiring an unusual degree of oversight or correction.
Development:	Maintains technical skills and relevant professional credentials.
Precision:	Produces work that is accurate, thorough, and demonstrates sufficient analysis and decision-making to meet the requirements of the employee’s position and profession.



ORGANIZATION & TASK MANAGEMENT	
Productivity:	Completes required volume of work by established deadlines and stays productive throughout the workday.
Prioritizing:	Takes sufficient, appropriate measures to plan work, prioritize tasks, organize work flows, set realistic goals, and manage multiple tasks or assignments.
Coordination:	Appropriately seeks clarification from or provides updates to supervisory management and/or team on the status of assigned workload, and completes assignments within established deadlines.
Presentation:	Maintains an organized and professional work environment.
CONTINUOUS IMPROVEMENT & QUALITY SERVICE ORIENTATION	
Service:	Takes steps to improve customer service by developing and/or implementing measurable and sustainable initiatives to culture that is effective, responsive, and respectful.
Orientation:	
Compliance:	Demonstrates the significance and importance of the overall values and mission of the university, including diversity and inclusion, compliance, ethics, and internal controls.
Safety:	Complies with all safety requirements for the position, including successful completion of training and proper use of personal protective equipment.
LEADERSHIP & RESULTS ORIENTATION (for supervisors)	
Oversight:	Provides adequate stewardship of assigned resources, including budget, space, equipment, and staffing to consistently deliver results.
Goal-Setting:	Provides clear objectives, goals, and priorities that foster work unit development, align with university values and strategic goals.
Manage Talent:	Provides candid, timely, and constructive feedback on performance and behavior and hires individuals with the qualities and skillsets for success.
Decision-Making:	Makes clear, effective decisions and produces results through strategic planning and development, and implementation and evaluation of programs and policies.
Leading:	Inspires and generates enthusiasm and commitment for the vision, mission and core values of the university and the unit, department or division. Serves as role model. Engenders trust, commitment, and civility.
DIVERSITY & INCLUSION (for supervisors)	
Diversity:	Models inclusive excellence through specific actions that support the university's diversity and globalization goals in the recruitment, hiring, and retention of talented and diverse faculty and staff.
Ethics:	Chooses ethical action, even under pressure, avoids situations that are inappropriate or present a conflict of interest, holds self and others accountable for ethical decisions, and addresses unethical actions directly.
Respect:	Appreciates individual and cultural differences, treats all people with dignity and respect. Fosters an environment in which people who are diverse can work together cooperatively and effectively in achieving organizational goals.