The 2024 ePerformance process for employee appraisals allows each division within the UM system to design a timeline for the process that suits the needs of the division. As a result, the CAHS will follow this timeline.

**Performance Appraisal Timeline Process: Open Now**

|  |  |
| --- | --- |
| Every Employee (including supervisors and eligible PIs) writes their self-appraisal and submits in ePerformance in MyHR | Now-April 26th 2024 |
| Managers and PIs SCHEDULE meetings with employees | Schedule meetings as far in advance as possible for a date between May 27th and June 7th so when the reviews are approved, your meetings are on the calendar to review with your employees. |
| Manager drafts appraisal for each employee and SAVES but does NOT SUBMIT. Instead, Manager creates a PDF of both employee and manager feedback and sends via email to PI the manager reports to. | April 29th- May 10th |
| PI’s review, make any suggestions, and reply to manager | May 13th - May 24th |
| Manager meets as already scheduled to discuss appraisal with employee; Manager UPDATES and SHARES the appraisal after meeting with employee in the MyHR platform. | May 27th- June 7th |
| Employee submits post-review comments and acknowledges appraisal/confirms receipt | Anytime after meeting with manager and before June 14th |
| Performance Appraisal Process closes | June 14th |

**Purpose of Annual Performance Appraisals** (UM System Summary)

The University of Missouri System’s new approach to performance feedback is grounded in the belief that frequent, honest conversations between managers and employees drive better performance and engagement. Progress check-ins are regular discussions that will happen three times a year to:

* Discuss what is going well and what could be better
* Check in on progress towards goals
* Stay aligned on current projects and
* Agree on next steps

In a performance-oriented culture, employees and managers are held accountable for whether goals and duties are accomplished throughout the year. Once a year, it is useful and valuable to summarize cumulative employee performance with an overall rating.

**Overview of the process:**

Each Progress Check-In will include a self-review, followed by a manager assessment, both completed in ePerformance. In addition, the employee and manager will meet to discuss both the self-review and the assessment. Once the progress check-in meeting occurs, employees will have the ability to make final comments. Each Progress Check-In will have three areas for both the employee and manager to review:

* Successes and accomplishments
  + What has the employee achieved/completed since the last Progress Check-In?
  + What is working well and helping the employee meet their goals/objectives?
* Concerns and growth opportunities
  + Has the employee experienced any challenges in meeting their goals?
  + Are there any professional concerns or developmental opportunities?
  + Are there any changes to these goals that the employee or manager should consider?
* Next Steps
  + What are the next steps for the employee and the manager?
  + What assistance does the employee need to accomplish their steps?

**Technical Assistance:**

Technical Assistance on using the MyHR system for the Employee Performance Evaluation Process, including step-by-step instructions on the Employee Self-Evaluation, the Manager Evaluation, and the Employee Acknowledgement, using a cheat sheet that can be found [here.](https://mailmissouri.sharepoint.com/sites/TeamsTraining-Ogrp/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FTeamsTraining%2DOgrp%2FShared%20Documents%2FDoITdocs%2FHR%2FePerformance%2FePerformance%20Annual%20Review%2Epdf&parent=%2Fsites%2FTeamsTraining%2DOgrp%2FShared%20Documents%2FDoITdocs%2FHR%2FePerformance&p=true&ga=1)

**UMKC Human Resources ePerformance Progress Check-in Support page:**

You can find information regarding the Annual Progress Check-in Calendar, an overview of the ePerformance Process, the Rating Scale, Tips on Providing Valuable Feedback and Additional Resources [here](https://www.umsystem.edu/ums/hr/performance-evaluation-resources?utm_campaign=321440_UMHR-LOD-ePerformanceOpens_20230412&utm_medium=email&utm_source=The%20Curators%20of%20the%20University%20of%20Missouri&dm_i=7IQU,6W0W,3GWJYP,YZL1,1).

**Frequently Asked Questions:**

1. What period of time does this performance evaluation cover?
   1. The review period you will be using to rate employee performance is from July 1st, 2023-June 30th, 2024.
2. What is the cut-off date for an employee who is eligible for a performance review?
   1. Any employee with a start date PRIOR TO April 3rd is required to have a performance review
   2. Any employee with a start date AFTER April 3rd is NOT required to have a performance review

**Other Manager Resources:**

**Performance Management - Resources and Training - Spring 2024**

* **On-Demand Training**
  + **“**[Building a Performance Culture](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fshare.percipio.com%2Fcd%2FXeYcZlTgv&data=05%7C02%7Cwatkinssh%40umkc.edu%7C4f8d3b9320bb4557772e08dc62ef1c47%7Ce3fefdbef7e9401ba51a355e01b05a89%7C0%7C0%7C638494026315122968%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=Di%2F1RXRV6E9x4W2bWpLk%2FxK%2FafgC7s1i%2FLTx7%2BiLu7Q%3D&reserved=0)**” (Percipio) -** Staff and managers can access the “Building a Performance Culture” training module anytime to learn about how our university can work together to build a culture that emphasizes consistent communication and accountability. This training is designed to help staff and managers understand how to:
    - Develop shared responsibility between managers and employees
    - Understand the importance of feedback, both positive and developmental
    - Reflect on what you’ve learned and apply it to the Progress Check-In process
  + AI Conversation Simulator (Percipio) **-** Practice feedback conversations in a simulated environment to build comfort and polish skills.
    - [Giving Developmental Feedback](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fshare.percipio.com%2Fcd%2F4f2JYXQRg&data=05%7C02%7Cwatkinssh%40umkc.edu%7C4f8d3b9320bb4557772e08dc62ef1c47%7Ce3fefdbef7e9401ba51a355e01b05a89%7C0%7C0%7C638494026315135291%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=YKfvwDqCPBnPhn7womUhMEyjSiBB6meOSzfNlw%2FJdUo%3D&reserved=0) (8 minutes)
    - [Providing Constructive Feedback During Performance Reviews](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fshare.percipio.com%2Fcd%2FGxi_Rq6p5d&data=05%7C02%7Cwatkinssh%40umkc.edu%7C4f8d3b9320bb4557772e08dc62ef1c47%7Ce3fefdbef7e9401ba51a355e01b05a89%7C0%7C0%7C638494026315143817%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=Rv8w8pGVMawMX%2FcnUVUOPpPdzKhsxu8s8gXC476jtTw%3D&reserved=0) (8 minutes)
    - [Coaching an Underperforming Employee](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fshare.percipio.com%2Fcd%2FkQKIjoq7T&data=05%7C02%7Cwatkinssh%40umkc.edu%7C4f8d3b9320bb4557772e08dc62ef1c47%7Ce3fefdbef7e9401ba51a355e01b05a89%7C0%7C0%7C638494026315150716%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=jCza1n%2BQPXW7gMLUwYg22PxHalbNHXsgNqz6mKCxqBo%3D&reserved=0) (8 minutes)
* **Scheduled Training**
  + “[Coaching Conversations and Performance Feedback for Supervisors](https://nam02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fshare.percipio.com%2Fcd%2FsQKZ7uhcx&data=05%7C02%7Cwatkinssh%40umkc.edu%7C4f8d3b9320bb4557772e08dc62ef1c47%7Ce3fefdbef7e9401ba51a355e01b05a89%7C0%7C0%7C638494026315157793%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=CJ01%2FoBIn79Ld9c7efnGbLR0479AbZu9yJkJds7WvgU%3D&reserved=0)” - Live webinar designed to help you brush up coaching skills and apply feedback frameworks to the Progress Check-In Process
    - May 2, 2024 from 10:30AM – 12:00PM
  + Watch for additional training ePerformance opportunities during UM System’s Staff Development Week May 20-23, 2024.

1. How will I rate myself, and how do supervisors rate employees?
   1. The rating system has been made easier. Each employee will receive only 1 rating score that summarizes their overall performance to date. The ratings are:

* **Needs development:** Does not consistently meet all expectations. Additional direction and support is required/needed. For example, support is required or needed for employee to complete required tasks and deliverables; employee does not meet deadlines on a fairly regular basis; employee requires regular intervention for corrective action.
* **Reliably delivers**: Consistently meets expectations and may exceed some expectations. Requires little to no additional direction to achieve established responsibilities. For example, showing up on time every day, meeting all project deadlines, anticipating next steps and initiating them without supervisor request are all aspects of meeting expectations – this level of performance is not considered exceeding expectations.
* **Consistently exceeds:** Consistently exceeds or delivers beyond expectations. Influences others to perform better. For example, regularly and reliably goes above and beyond what is expected; consistently innovates; creates projects and proposals that enhance the Collaborative's portfolio; works over and above the job duties.