

# FAQs: Performance Management

## Goal Related Questions

### **What timeframe should be used for goals, annual, or shorter than that?**

- It depends on the goal, and could be annual, 6 months, or quarterly.
- Think about breaking down a larger goal into realistic, smaller goals that can be accomplished within the fiscal year.
- Be prepared to adjust with changes throughout the year and utilize the midpoint conversation to create new goal(s) or adjust goal(s) for the last 6 months of the year when appropriate.

### **Is it 3-5 goals overall or 3-5 of each type of goal, performance, and career?**

- 3-5 total, which will include EDI, performance, and career goals.
- Make sure goals are realistic and can be accomplished within the fiscal year.

### **Do you have an example of an EDI goal?**

- Each employee is expected to complete at least 4 hours of EDI professional development activities during the 23-24 fiscal year.
- Identify opportunities to meet the above expectation and document what you and your employee agree to within their personal goal.
- Some units may have team learning opportunities that can be incorporated into individual goals.
- *Example: John will complete 4 hours or more of EDI professional development activities by June 30, 2024. This will be a combination of individual and team learning opportunities. John will summarize and share the information he learned from each activity with his supervisor.*

### **If a goal is completed as part of midpoint conversation, should we include that as part of the summary evaluation?**

- The summary evaluation should include performance and goals for the entire fiscal year. There is not a need to provide as much detail on goals that were met, discussed, and documented in the midpoint conversation.

### **Does the employee have to sign the performance evaluation?**

- Employees are expected to sign the evaluation, which does not indicate they agree with the evaluation but that they received it. Employees are able to indicate if they agree or disagree when acknowledging the evaluation and they can include comments if they choose.
- If the employee refuses to acknowledge the evaluation, the supervisor should note that the evaluation was presented to the employee and that he/she refused to sign and indicate the date on which it took place.



## What should I do if my employee is not meeting expectations overall?

- Discuss with Human Resources to determine next steps. It may be appropriate to put a letter of expectation (Academic Staff) or performance improvement memorandum (University Staff) in place for that employee.

## Performance Related Questions

### What is recommended to be more specific about direct feedback opportunities?

- Stick to the facts by giving specific examples of what happened and the outcomes when performance was not at the expected level. Next, provide how you would expect similar situations to be handled in the future.
- Focus it on what success looks like. Tell the employee what is needed to move their performance forward.

### How do you document exemplary?

- In the evaluation, you are able to rate every responsibility and goal. Make sure to document how they have gone above and beyond and provide examples.

### How is compa-ratio and position in range (PIR) defined?

- Compa-ratio expresses how an employee's pay rate compares to the midpoint of their range. To calculate compa-ratio you take the pay rate divided by the midpoint of the salary range.
- Position in range (PIR) expresses how an employee's pay compares to the pay range and how far into a pay range an employee's pay stands. PIR is calculated as follows:
  - $PIR = (Pay\ Rate - Range\ Minimum) / (Range\ Maximum - Range\ Minimum)$
- When looking at compa-ratio and PIR, the table below defines the three salary grade position references that are referenced throughout [the salary administration guidelines \(SAG\)](#):

	<i>Emerging in Grade</i>	<i>Established in Grade</i>	<i>Advanced in Grade</i>
<b>Salary Grade Position References</b>	Compa-Ratio Less than 85%	Compa-Ratio Between 85%-115%	Compa-Ratio Greater than 115%
	<b>OR</b>	<b>OR</b>	<b>OR</b>
	PIR Less than 25%	PIR Between 25% and 75%	PIR Greater than 75%

### How many areas would need to be exemplary in order to qualify for “pay for performance”?

- If most of the areas are exemplary, then they could be considered exemplary overall.
- Different goals and expectations could be weighed differently. All things may not be equal. If a certain goal is a main component of their entire role, but they are not exemplary in that area but are in others then it may not be exemplary overall.



- The [SAG](#) provides guidance on pages 16-17 on the range of increases that would be considered based on someone's performance and their position within the grade.

**For the more incremental increases and providing those, is the SoE considering doing that every year, every 2 years?**

- We are still looking into options for this, in relation to CCF, pay plan and other compensation increase types.

**Role Related Questions**

**I have only been supervising my staff for a short time, or I am the Interim Supervisor, should I still complete the performance evaluations?**

- Yes. Consult with the next level supervisor in completing the appraisal or Human Resources. The current supervisor or interim supervisor is ultimately responsible for completing the performance evaluation.

**How do I complete an evaluation for someone that is transferring supervisors?**

- If you have a new employee that had another supervisor for part of the evaluation period, you should request input from the prior supervisor whenever possible and incorporate that into the review. In some instances, it may be appropriate for both supervisors to meet with the employee to deliver the evaluation.
- For other situations, please reach out to Human Resources.

**Is there a timeframe for when you would expect someone to be fully competent in their role?**

- This depends on many factors such as, whether the role is entry level vs a more senior level complex role, the relevant job and/or industry experience the employee brings to the role, etc.
- Try not to compare employees against each other in this regard but assess the individual: are they making progress? Is there a sufficient level of effort?

**For those new in their role on a different timeframe, how do we get them back onto the regular annual calendar for reviews?**

- If their end of probation review occurs within 90 days of the annual review cycle, then they can move to the beginning of the annual review process. If there is more than 90 days between the probationary evaluation and the annual cycle, you would complete the probation review and then also complete the annual review at the normal time.

