



## STAFF PERFORMANCE PROGRAM FOR NON-REPRESENTED EMPLOYEES AT UC BERKELEY

Below is a summary of the new staff performance program  
launching in April 2020

### WHY

#### To support continuous improvement of individual and organizational performance

UC Berkeley is the world's leading public research university. To maintain our position and advance further, we must work smarter, better, faster. We have to encourage bold, innovative thinking to continually improve our organization to meet the demands of tomorrow. To this end, the new performance program (for non-represented staff), Achieve Together, eliminates annual performance evaluations and implements guided check-in conversations focused on how current work informs future planning around goals, job accountabilities, inclusion & belonging, innovation, and collaboration. The program goals of Achieve Together support a workforce that is more agile, results driven, engaged workforce, and focused on strengthening collaborative partnerships among employees.

#### 1) Strengthen collaborative partnerships

To drive employee success and engagement, the most significant relationship at work is that between the supervisor and employee. Rather than a top-down, directive approach, Achieve Together positions our work within a collaborative framework in which ideas are exchanged, concerns are discussed, and work is aligned with team and organizational strategies. Managers and employees check-in on goals, job mastery, collaboration, innovation, and inclusion/belonging, and explore additional knowledge, skills, and support needed to achieve results together. Achieve Together is a collaborative process allowing the employee to drive their performance and the manager to empower their success.

At UC Berkeley, we know an effective way to get work done is through the creation and cultivation of strong working relationships. These partnerships fortify individual, team, and organizational success through boosting morale, driving efficiencies, broadening collective knowledge, increasing engagement in strategic work, and fostering a more equitable and inclusive environment.

#### 2) Agile workforce

Future needs are continually changing. An agile workforce strengthens through change, is eager to streamline and simplify, open to exchanging information and collaborating, and focused on future planning. For a workforce to be agile, frequent, open communication that looks forward is needed in the relationship between employees and managers. By broadening lines of communication, we can be flexible to adjust in real-time evolving situations.

#### 3) A results oriented, performance driven workforce

Chancellor Christ has put in place our strategic plan that sets forth an ambitious path to reach new heights of excellence and social impact. The way to drive Berkeley to new heights is to align individual and team goals with the organization's strategic goals. When everyone has a line of sight between their performance and the goals of the organization, we all benefit understanding the value of contributions and the important role we play in helping UC Berkeley achieve success.

#### 4) An engaged workforce

When we seek regular coaching, mentoring, and professional development, we get a clearer view to see how our contributions impact the success of the organization. When we are showing up as supportive, open, and thoughtful, our community is more empowered, energized, connected, and committed to UC Berkeley. This increased engagement results in greater retention, innovative, efficient, cost effective solutions, and, overall improved organizational performance.



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### WHAT

Below are the key elements of the new performance program. The new program was designed to strengthen partnerships between employees and their managers, and to support a more agile, engaged, and performance driven workforce. Year-end performance ratings transition to ongoing check-ins around five clear and shared metrics/categories focused on evaluating/developing what we do and how we do it.

#### 1) [Achievement Criteria](#)

Some performance models focus heavily on goals (what we do) and others measure only behaviors (how we work). UC Berkeley's Achievement Criteria, including collaboration, goal accomplishment, inclusion & belonging, innovation, job mastery, evaluative transparency and alignment on what we produce, and how we support the success of the organization. Managers are evaluated on these five indicators as a contributor, in addition to how they manage and enable supporting their team's collaboration, goal accomplishment, inclusion & belonging, innovation, and job mastery.

#### 2) [Check-in Conversations](#)

Traditional year-end performance reviews that hold people accountable for past behavior will be replaced by three scheduled check-in conversations that focus on improving current performance and developing talent for the future. There will no longer be a beginning or an end to the performance discussion cycle – it will be continual. Check-ins allow the opportunity for managers and employees to use the Achievement Criteria as a planning tool, revisit projected goal outcomes, and identify knowledge, skill, and support needs for success.

#### 3) [Goal Setting](#)

Goals can be set for any length of time (1mo, 4mos, 1yr, 2yrs), and are revisited during each check-in conversation. Employees will have 3-5 goals at any time; one goal focused on professional development (skills, knowledge, and experiences needed for growth), and the remaining 2-4 to include job accountabilities, stretch assignments, special projects, or UC contributions (Staff Organization participation or leadership, campus committee service, etc.). Organizations will use the SMART or OKR methods for goal setting. Goals must be clear and unambiguous, attainable (though a stretch), and time-bound. Managers/supervisors are responsible for goal assignments and alignment with unit priorities.

#### 4) [Achieve Together Online Dashboard](#)

The previous year-end performance review form will be replaced with a shorter online check-in form focused on goal progress and future-focused questions, creating dialogue geared to enrich collaboration, goal accomplishment, inclusion & belonging, innovation, job mastery, and employee engagement. The online check-in form can be used to prepare, document during the conversation, and follow up with additional notes following check-ins every four months.

#### 5) [Merit](#)

In years when a merit fund is available, check-in documentation will be used as a tool for managers to produce a merit recommendation through using the Achievement Criteria. To support precise recommendations, units are responsible for ensuring completion of check-ins and consistent and fair application of the Achievement Criteria. Once the merit process is complete, managers should meet with employees to discuss their achievement criteria.

#### 6) [Coaching](#)

Ongoing coaching conversations between check-ins during regularly one-on-ones or spontaneously provide space to support clear expectations, problem solving, constructive feedback, recognition of results, and calibration of support for team initiatives. Managers are encouraged to attend [Growing as a Coach](#) training offered by the People & Organization Development team. This training offers skill building and practice on coaching to improve employee engagement and performance contribution. The [Cal Coaching Network \(CCN\)](#) is a space for all staff to support building a UC Berkeley's coaching culture.



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### WHEN

#### Achieve Together Check-in Conversations and Documentation

Check-in Period Name	Timeframe Covered	Hold Check-in Conversation During 1on1 Between	Documentation Due Date
Spring/Summer	Apr 1 - Jul 31	Jul 1 - Aug 31	31-Aug
Fall	Aug 1 - Nov 30	Oct 1 – Dec 31	31-Dec*
Winter	Dec 1 - Mar 31	Mar 1 - Apr 30	30-Apr

\*Complete before curtailment or the week you return

### Merit Process

Merit Cycle	
April 1	Begin Merit Cycle
March 31	End FY Merit Cycle
June	Merit Process*
August	Merit increases reflected in paychecks
*Merit Process open and close dates are approximate, and campus will receive further communication from UCOP about finalized dates.	

### HOW

Check-in conversation documentation will be completed using a simple online form focused on current and future performance planning. It can be accessed at [achieveform.berkeley.edu](https://achieveform.berkeley.edu),

On the next page, you will find recommended steps to complete each check-in. To support an effective and clear check-in process, both managers and employees have roles and responsibilities for before, during, and after the check-in conversation.

[Knowledge Base](#)

[Training options & resources](#)

[Support](#)



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	Manager/Supervisor	Direct Report
Before	<ol style="list-style-type: none"> <li>1. Plan how you will apply <a href="#">coaching skills</a> to the <a href="#">check-in conversation</a>, especially how to help your direct report talk about their performance, to listen-in to an individual's work experience, and to help them be successful. Prepare how you will discuss work that is on track, accomplishments, and opportunities for improvement.</li> <li>2. Review the <a href="#">Achievement Criteria</a> to consider current and future states of work, and what you can do to support your direct report's acquisition of knowledge, skills, and support needed to be successful.</li> </ol>	<ol style="list-style-type: none"> <li>1. Reflect on the current state of work, where it's going, what's needed for success, and the quality of your work experience, including the relationship with your manager. Prepare how you would like to discuss what's on track, major accomplishments, and opportunities you have for improvement.</li> <li>2. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> as a guide for preparing to talk about your work performance (collaboration, goal accomplishment, inclusion &amp; belonging, innovation, and job mastery).</li> </ol>
During	<ol style="list-style-type: none"> <li>1. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> performance indicators to encourage the employee to focus on current progress..</li> <li>2. Use terminology that makes sense in your everyday conversations, rather than a rote reading of the check-in questions. The goal is to have a meaningful conversation, not a formal interview.</li> <li>3. To go deeper into the conversation, use open-ended questions to check for clarity and explore the employee's work experience. Seek to understand through finding agreement and explore discrepancies. Discuss work that is going well and on track, accomplishments, and opportunities for improvement. Use the 4-step <a href="#">coaching model</a> to explore, discover, plan, and act.</li> <li>4. During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in.</li> <li>5. Be sure to check-in on <a href="#">goal accomplishment expectations</a> for the next four months. Ensure alignment with team, unit, and campus strategies.</li> </ol>	<ol style="list-style-type: none"> <li>1. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> performance indicators to discuss your current work progress and experience, in addition to future performance planning. These questions are pathways to go deeper on topics, issues, and themes, and not to limit the extent of the conversation.</li> <li>2. Be open to feedback, partner in problem-solving, and take ownership over your achievements and areas for improvement.</li> <li>3. Spend time discussing additional knowledge, skills, and support needed for success at UC Berkeley.</li> <li>4. During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in.</li> <li>5. Check-in on <a href="#">goal accomplishment expectations</a> for the next four months.</li> </ol>
After	<ol style="list-style-type: none"> <li>1. Start and share an Achieve Together documentation form for the check-in period on your performance <a href="#">dashboard</a>. Once opened, the form will be automatically available in your employee's inbox.</li> <li>2. Review key highlights of the conversation from your perspective and document in the Supervisor Comments section of the form, noting accomplishments, work that is going well and on track, and opportunities for improvement.</li> <li>3. Document any updates to goals that were discussed during the check-in conversation. These updates are to reflect the next four months of goal completion expectations.</li> <li>4. Save and finalize your notes and comments to complete your part of the form.</li> <li>5. Ensure you have 1on1s scheduled between check-in conversations to exchange feedback, and to connect on work expectations, goals, priorities, what's going well, areas for improvement, and needed support for success.</li> </ol>	<ol style="list-style-type: none"> <li>1. After the supervisor starts and shares the check-in form, it will arrive in your inbox ready for edits. You can access the form on your Achieve Together <a href="#">Online Dashboard</a> as well.</li> <li>2. Review key highlights of the conversation from your perspective and document these in the Employee Comments section of the form.</li> <li>3. Review goal updates made by your supervisor based on what was discussed in the check-in conversation. Connect with your manager if there are questions or concerns.</li> <li>4. Save and finalize your notes and comments (signifying you reviewed the content in full) to complete your part of the form.</li> <li>5. Ensure you have 1on1s scheduled between check-in conversations to exchange feedback, and to connect on work expectations, goals, priorities, what's going well, areas for improvement, and support you need for success.</li> </ol>