



FAQs

1. What is ACHIEVE?

ACHIEVE is the new UCI staff performance program for non-represented employees. ACHIEVE replaces all current performance evaluation processes and forms across the UCI enterprise, including the main campus, health sciences and the medical center.

2. What is a staff performance program?

Individual employee performance contributions drive the business results that accomplish the goals of an organization. The performance program is the mechanism by which managers help translate the organizations business goals, objectives, and performance standards to individual employee goals and expectations.

3. Why is UCI implementing a new staff performance program?

UCI is a premiere public research university and academic medical center. To maintain our position and advance even higher, we must develop a workforce that is agile, performance-driven and engaged. The previous traditional performance program, in which performance plans are set at the beginning of the year and then feedback from managers is received once or twice a year with a focus on the past, is no longer effective at engaging the new workforce and improving organizational performance. ACHIEVE incorporates current best practices in the field of performance management including regular and honest two-way communication between employees and managers, direct line-of-sight between employees' goals and the goals of the organization, and effective coaching, mentoring and development from managers. ACHIEVE was designed to support the workforce UCI will need to advance to greater heights.

4. When will it be implemented?

ACHIEVE became effective on July 1, 2017.

5. What are the key elements of the new program?

- Informal quarterly check-in discussions between employees and managers replace annual performance evaluations and ratings. Check-ins occur in July, October, January and April.
- Performance period is continual, with no beginning and no end.
- Brief check-in forms are completed by both employees and managers in preparation for check-in discussions.
- Check-ins focus on two things: 1 to 5 performance goals and 4 pre-formatted discussion questions that facilitate valuable dialogue.
- Managers will be trained on how to mentor, coach and develop employees.
- Check-ins will be completed online after the new online system implemented in the fall of 2017.
- In years when a merit fund is available, information discussed and documented during check-ins, as well as the UCI merit criteria, will be used to determine merit levels and merit awards.



6. What is the process?

The first check-in will be the October check-in. There are 3 easy steps to completing the first check-in:

- Step 1, Set Goals. In July/August, the employee and manager meet in-person to agree on one to five performance goals, and the goals are entered onto the check-in form. Until the new online system is implemented in the fall of 2017, employees and managers will use an electronic fillable form and manual process.
- Step 2, Complete Check-in Form. Approximately two weeks before the scheduled check-in discussion, the employee completes their self check-in and then the manager completes the check-in. Each prints a copy of the final document and brings it to the check-in discussion in October.
- Step 3, Meet for Check-in Discussion. In October, the employee and manager meet in-person to discuss goal progress and feedback to pre-formatted discussion questions, and the final document is saved.

7. Where do I find the interim check-in form?

The electronic fillable check-in form can be found at hr.uci.edu/partnership/performance/form.

8. What timeframe does the October check-in cover?

To accommodate the transition from an annual performance review to quarterly check-ins, the October check-in will cover a period of six months – from April 1, 2017 to September 30, 2017 for employees at the campus and health sciences. For employees at the medical center, it will cover the period between the last anniversary review date and September 30, 2017. Future check-ins will cover only one quarter (or three months.)

9. Where will the final interim check-in form be stored?

Final interim check-in documents should be stored in accordance with department records retention policy, e.g., print and place in personnel file or print, scan and save online, etc. Once the online system is implemented, check-in forms will be stored online.

10. When will the online system be implemented?

The new ACHIEVE online performance system will be implemented in the fall of 2017. Communication regarding the new system will be released closer to implementation.

11. What will we do for the January 2018 check-in?

Information regarding the January 2018 check-in will be released in the fall of 2017 after the implementation of the new online system.



12. What are performance goals?

Performance goals provide a roadmap for the employee on what is expected of them and what they can do to help the organization achieve its strategic goals. Aligning employee performance goals with UCI's and departments' strategic goals is the foundation of ACHIEVE. Employees collaborate with their managers to define their own performance goals and take active ownership to achieve those goals. In today's rapidly changing and complex UCI work environment, performance goals must be agile and adaptable. Employees and managers must meet regularly to update, modify, archive, and add new performance goals.

13. Should performance goals be every day duties and tasks, long-term special projects or stretch goals that go above and beyond normal daily duties?

Performance goals are job responsibilities related to key tasks and projects, and may include special projects and stretch goals. Goals should be SMART (specific, measurable, agreed upon, realistic and time-bound), and may be achieved in just one quarter or may span across several quarters. They may be individual goals, team goals or organization goals, and they may be related to professional development or a specific area in which improvement is needed. As long as the goal is aligned with a UCI or department goal, it is a performance goal.

14. Do we set different goals for At Target and Above Target?

No, there is no need to set varying targets for each goal. One set of performance goals that align with UCI's and the department's strategic goals should be established for each employee. It is expected that the employee will work to reach all of their goals. Whether or not they reach those goals and the behaviors exhibited while achieving those goals will determine the employee's merit level.

15. What are the pre-formatted discussion questions?

The five pre-formatted discussion questions are as follows:

1. What are you most proud of and what additional accomplishments have you achieved in this check-in period?
2. How have you performed as an enterprise contributor and demonstrated innovation during this check-in period?
3. What additional information, knowledge, skills, resources do you need to master your job and accomplish goals?
4. What would increase your job satisfaction and success?

The fifth question is to be answered by the manager

5. What am I doing to maximize your and our team's talent and organizational capabilities to help the organization achieve its strategic goals?



16. Doing performance evaluations once a year took a lot of time. Won't doing them four times a year take even longer?

With the previous performance program, non-represented employees spent several hours at the end of each performance year collecting records on accomplishments and completing self-evaluations. Managers did the same before completing each employee's annual performance evaluation. Approximately 60,000 hours were spent each year on annual performance evaluations with little to no added value. ACHIEVE is estimated to take a total of 25,000 hours each year (less than half the time), and will transform our workforce. This is because the check-in should be incorporated into the regular one-on-one meetings that already occur. Additionally, as events occur, they are entered onto the check-in form and then discussed. This real-time, informal feedback will increase agility and employee engagement, and lead to increased levels of performance.

17. How will merit be distributed if we no longer have performance ratings?

In years when a merit fund is available, the information discussed and documented in the check-ins, as well as the [UCI merit criteria](#), will be used to determine merit levels and merit awards. Continual dialogue about performance will result in merit decisions that are more closely aligned with performance contributions.

18. Doesn't the merit level replace the performance rating?

Performance is no longer rated, it is developed through continual dialogue. The merit level helps managers determine where within the range of allowable merit increases an employee should be rewarded based on performance contributions. For example, did the employee consistently meet the high standards associated with the "On Target" merit level, or did they meet the rigorous standards associated with the "Above Target" merit level? Those who met the "Above Target" criteria receive a larger merit award to recognize their exceptional performance contributions and motivate others to perform at a consistently higher level. Those who do not meet the standards associated with "On Target" receive no merit increase.

19. Can we use the new check-in process for probationary employees?

Yes, check-ins are completed every three months, which aligns nicely with a 3-month and/or 6-month probationary review.

20. What about contract employees?

Yes, the check-in can be used for non-represented career, partial year career or contract employees.



21. Can ACHIEVE be used for represented employees?

No. Changes to performance management programs for represented employees are subject to bargaining. Continue to use the current performance management program for represented employees.

22. How do we handle a newly hired non-represented employee or an employee who moves from a represented position to a non-represented position?

If the start date is in the first month of the quarter, the employee will participate in the check-in for that quarter. If the start date is in the second or third month of the quarter, the employee will wait until the next quarterly check-in to start the process.

23. How do we handle an employee who moves from a non-represented position to a represented position?

If the employee is in the non-represented position in the last month of the quarter, the employee and manager will complete the check-in process (written feedback and discussion). If not, the check-in will be canceled.

24. How do we handle an employee who remains non-represented but changes departments during a check-in period?

The check-in process (written feedback and discussion) will be completed by the manager with whom the employee spent the majority of the quarter.

25. Should the check-in form be used as a performance improvement plan or professional development plan?

While the quarterly check-in addresses performance and opportunities for professional development, it should not serve as the official performance improvement plan or development plan. Managers should contact their department HR representative regarding either of these.

26. Where can I go if I have questions regarding information contained in the FAQs or for more information on ACHIEVE?

Additional information can be found at <http://hr.uci.edu/partnership/performance/> including a questions link and information videos.

27. Who should I contact with concerns?

Employees should go to their immediate manager with questions or concerns. If employees need additional assistance, they should contact their [campus](#), [health sciences](#) or [medical center](#) HR business partner.