

**UCSC HR Initiative - Standardized Performance Management Process
Project Overview**

Objective: Ensure all career employees receive an annual performance appraisal

Project Team:

Sponsor: Willeen McQuitta

Chair: Cecile Morris

Advisory Group:

- Suzanne Purcell
- Cathy Schoenfeld
- Cher Roberts
- Bill Parro
- Madlyn Norman –Terrance

Adjunct Advisory Group:

- Mark Cianca
- Annie Kearney
- Patti Hiramoto

Forms Workgroup:

- Barbara Collins
- Joan Rosebraugh
- Bill Heinrich
- Elaine Rivas

Training Workgroup:

- Joan Rosebraugh
- Patti Hiramoto/Ciel Benedetto
- Elaine Rivas
- Training Department Representative

Timeline:

January	Complete draft letter for EVC to campus managers and supervisors regarding Performance Management (PM) Establish a detailed project plan Establish workgroups to research best practices and develop appropriate forms and training Establish appropriate tool for measuring success-ongoing Meet with Labor Relations Continue to conduct performance management training once per quarter
February	VC BAS shares PM Initiative with campus leadership Collect data: 1. forms presently used, 2. past practices on letters for annual “call”, 3. tracking used by service centers for annual appraisal

March	EVC letter to Principal Officers Meet with Advisory group Add two classroom sessions for Performance Management
April	Release revised PPSM Policy 23 Conduct focus groups for Sup/Mgrs providing feedback on forms
May	Notify managers and supervisors of PM Initiative - Director McQuitta Place Timeline on SHR web site Send Performance Appraisal call to campus for Fiscal Year 2005/2006 Conduct final focus group for campus feedback on forms Meet with work groups to begin work on forms and training module development
June - August	Draft new performance evaluation forms
Sept. through October	Finalize performance evaluations forms, consult with SHR Advisory Committee, record and track receipt of appraisals for 05-06
November	Notice unions regarding revised performance evaluation forms
October 2006 through December	Continue classroom training of performance management Develop and place tools/references on the web
January 2007	Roll out new forms and associated training
March 2007	Develop/implement web-based training
May 2007	Send Performance Appraisal call to campus for Fiscal Year 2006/2007
June 2007	Implement "refresher" training modules
September 2007	Track receipt of completed 2006/2007 Performance Appraisals
October through December 2007	Evaluate and follow up for possible revisions

SHR

Revised: 9/25/06