

Achieve Together

Employee Resources

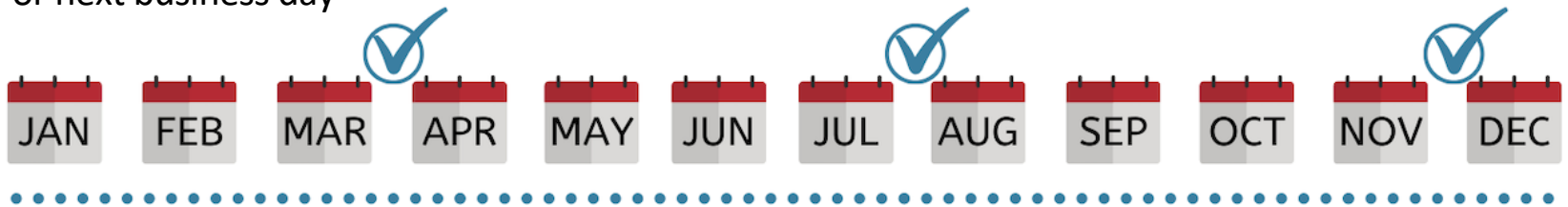
UCB Old Program vs. Achieve Together Program

Outmoded (Past Performance Management)	Evolved (Achieve Together Check-ins Program)
Performance appraisals and goal-setting conducted once-per year	Check-ins conducted every 4 months; regular goal and expectation setting occurs through an open, collaborative process
Feedback collected by manager at the end of the year	Feedback exchanged and incorporated into ongoing check-ins
Goals focused on individual achievement	Individual goals tied to organizational, departmental, and group priorities
Evaluations focused on goals	Check-ins focused on goals, job mastery, inclusion/belonging, collaboration, and innovation
Managers focused on evaluating performance	Managers focused on coaching and developing people
Process disjointed, administratively burdensome and not best value/use of time	Process is aligned with day-to-day work, agile, and ongoing
Performance program not aligned with merit cycle. Retroactive merit payments.	During years in which merit funding is available- Performance program aligned with merit cycle. Merit rewards paid on time! Not retroactive.

Check-in Period Schedule

Check-in Period Name	Timeframe Covered	Hold Check-in Conversation During 1on1 Between	Documentation Due Date
Spring/Summer	Apr 1 - Jul 31	Aug 1 -Sept 15	Sept 15*
Fall	Aug 1 - Nov 30	Dec 1 – Jan 15	Jan 15*
Winter	Dec 1 - Mar 31	April 1 - May 31	May 31*

*or next business day



Performance Achievement Criteria

- **Collaboration:** Enhances individual work by soliciting contributions from others and enhances others' work by contributing to their success to more effectively meet unit goals.
- **Goal Accomplishment:** Achieves individual goals that contribute to unit priorities.
- **Inclusion & Belonging:** Demonstrates respect for people and their differences, regardless of race, ethnicity, class, gender identity and expression, sexual orientation, socioeconomic status, ability, country of origin, cultural, political, religious, or other affiliations. Understands the benefits of a diverse workforce, is trusted and respected by others, includes and welcomes others, and works to understand the perspective of others.
- **Innovation:** Uses knowledge, skills, and professional experience to seek efficiencies and improve work outcomes.
- **Job Mastery:** Demonstrates the knowledge, skills, and abilities that result in high performance and contributions within the scope of the employee's job description.

Achievement Criteria Quick Guide

Quick guide	Needs Attention	Well Done	Stand Out
Collaboration	All Non-Rep Employees		
	<ul style="list-style-type: none"> - Does not volunteer to support others - Inflexible or unconstructive - Shuts down communication and/or collaboration among employees 	<ul style="list-style-type: none"> - Volunteers to support others - Flexible and constructive - Consistently communicates openly and partners effectively to get work done 	<ul style="list-style-type: none"> - Prioritizes volunteering to support others - Sought after to lead or participate in collaboration - Always facilitates open dialogue among appropriate contributors and is a role model for collaborative work
	Manager/Supervisor		
	<ul style="list-style-type: none"> - Does not hold team accountable for follow-through - Does not share information with others - Does not facilitate conflict resolution 	<ul style="list-style-type: none"> - Consistently holds team accountable for collaborative expectations - Ensures team coordinates shared work - Facilitates conflict resolution 	<ul style="list-style-type: none"> - Always ensures team follows through above collaborative expectations - Anticipates needed information and stimulates knowledge exchange - Develops skills for collaborators to constructively resolve conflict
Goal Accomplishment	All Non-Rep Employees		
	<ul style="list-style-type: none"> - Does not achieve goals - Does not focus on critical issues - Does not use resources appropriately (tangible or intangible) 	<ul style="list-style-type: none"> - Achieves goals - Consistently prioritizes critical issues - Uses resources (tangible or intangible) appropriately 	<ul style="list-style-type: none"> - Exceeds goal expectations - Always prioritizes critical issues - Models effective use of resources (tangible/intangible) for self and others
	Manager/Supervisor		
	<ul style="list-style-type: none"> - Does not align individual/team goals with unit priorities - Does not enable team to achieve goals 	<ul style="list-style-type: none"> - Consistently aligns individual/team goals with unit priorities - Consistently enables team to achieve goals 	<ul style="list-style-type: none"> - Always models individual/team goal alignment with unit priorities - Enables team to exceed goal expectations
Inclusion & Belonging	All Non-Rep Employees		
	<ul style="list-style-type: none"> - Does not value, encourage, or adapt to different perspectives - Lacks sensitivity of other cultural norms or ways of communicating - Uses language and behavior that is exclusionary or offensive 	<ul style="list-style-type: none"> - Values differences and applies others' perspectives to get results - Sensitive to cultural norms, expectations, and ways of communicating - Uses inclusive and non-offensive language and behaviors 	<ul style="list-style-type: none"> - Appropriately encourages and incorporates diverse points of view for enhanced results - Senses how and takes action related to how differences impact needs, values, and motivators - Creates a culture of inclusion that does not tolerate exclusionary language and behavior
	Manager/Supervisor		
	<ul style="list-style-type: none"> - Does not hold team accountable to the inclusion-belonging indicators for non-rep staff 	<ul style="list-style-type: none"> - Makes known effort to hold team accountable to the inclusion-belonging indicators for non-rep staff 	<ul style="list-style-type: none"> - Sought out as subject matter expert, mentor, and advisor, resulting in stand out performance in the inclusion-belonging for non-rep staff
Innovation	All Non-Rep Employees		
	<ul style="list-style-type: none"> - Does not flexibly adapt to change or seek efficiencies - Discourages diverse and creative initiatives of others - Does not experiment with new ways of thinking or doing 	<ul style="list-style-type: none"> - Seeks efficiencies and adapts to change - Encourages diverse thinking to nurture innovation - Comes up with useful ideas that are better or unique 	<ul style="list-style-type: none"> - Challenges low-value practices, leads changes that enhance effectiveness - Finds/champions the most diverse and creative ideas and proposes action - Moves beyond traditional practices and pushes beyond the status quo
	Manager/Supervisor		
	<ul style="list-style-type: none"> - Creates environment that discourages creative and diverse initiatives 	<ul style="list-style-type: none"> - Creates environment that enables creative and diverse initiatives 	<ul style="list-style-type: none"> - Enables team to actively implement diverse and creative value-add opportunities
Job Mastery	All Non-Rep Employees		
	<ul style="list-style-type: none"> - Does not perform job functions effectively - Does not make decisions within scope of role and job description guidelines - Not receptive to direction, coaching, feedback, and development 	<ul style="list-style-type: none"> - Performs job functions effectively and may exceed work expectations - Makes sound decisions within scope of role and job description guidelines - Responsive to direction, coaching, feedback, and development 	<ul style="list-style-type: none"> - Always demonstrates expertise in completing job functions - Always demonstrates effective decision making with scope of role and enables sound decision-making up/down stream from role - Takes ownership of development, seeks feedback, highly coachable, anticipates and accepts guidance and direction
	Manager/Supervisor		
	<ul style="list-style-type: none"> - Does not effectively manage, develop, or learning to improve performance - Does not engage team or observe/discuss performance/development goals - Does not align teamwork with unit priorities 	<ul style="list-style-type: none"> - Effectively pursues improvement of team skill sets - Effectively engages team via managing performance, change, and appreciation - Ensures teamwork is equitably distributed and aligned with unit priorities 	<ul style="list-style-type: none"> - Excels as a coach, resulting in outstanding team performance contributions - Always manages and empowers to the highest levels of employee engagement - Demonstrates consistent promotion of self/team's responsibility over scope of roles

<https://hr.berkeley.edu/performance/achieve-together>

Determining Performance Levels

- To determine the Performance Levels, managers will refer to notes from check-in conversations, compare them to the behaviors for that particular criteria and identify a Performance Level that aligns most closely with performance within the overall evaluation timeline (April 1-March 31).
- Managers will assess the level attained across each of the five criteria (e.g., Job Mastery = Well Done, Goal Accomplishment = Well Done, Inclusion & Belonging = Stand Out, Collaboration = Stand Out, Innovation = Well Done) to determine an overall Performance Level, considering overall performance contributions and documentation from three check-in conversations.
- If an employee gets a Needs Attention for any one of the four criteria they are not eligible to receive an overall Performance Level of Stand Out.
- Those with an overall Performance Level of Needs Attention are not eligible for merit increases (when merit funding is available).

Examples of Overall Performance Levels

1. Employees must demonstrate performance level behaviors in at least 3 of the 5 criteria listed in a specific level to be recommended for that merit level
2. The five performance indicators in the Achievement Criteria are weighted equally
3. Managers/supervisors must use the information discussed and documented as part of check-in conversations every 4 months to support the recommended performance level

	Needs Attention	Well Done	Stand Out
Collaboration	Does not volunteer to support others. Inflexible or uncooperative. Doesn't have communication and/or collaboration among staff.	Volunteers to support others. Flexible and cooperative. Communicates openly and partners effectively to get work done.	Proactively volunteers to support others. Highly flexible and cooperative. Communicates openly and partners effectively to get work done.
Goal Accomplishment	Does not set and achieve goals. Does not have an overall plan. Does not have information about what is going on with the organization.	Sets and achieves goals. Has an overall plan. Has information about what is going on with the organization.	Proactively sets and achieves goals. Has an overall plan. Has information about what is going on with the organization.
Inclusion & Belonging	Does not value, encourage, or assist in different perspectives. Does not have an open mind to new ideas. Does not have a behavior that is not inclusive or offensive.	Values differences and assists in different perspectives. Has an open mind to new ideas. Has a behavior that is not inclusive or offensive.	Proactively values differences and assists in different perspectives. Has an open mind to new ideas. Has a behavior that is not inclusive or offensive.
Innovation	Does not have the ability to change. Does not have the ability to change. Does not have the ability to change.	Has the ability to change. Has the ability to change. Has the ability to change.	Proactively has the ability to change. Has the ability to change. Has the ability to change.
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Informing the Overall Performance Level

1 Overall Official Performance Level within the Performance Cycle
Apr 1-Mar 31

Needs Attention | Well Done | Stand Out

- Overall performance levels
- Each performance indicator is weighted equally
- Overall "needs attention" = no merit (when funding is available)
- Determining range within an overall level

Check-In Conversations

- Ongoing 1on1 conversations between managers and employees
 - Goals, expectations, plans of action, support for improvement
- Occur as part of 1on1 mtgs
- Documented every 4 months
- Simple, lightweight, flexible



Guided Questions that Map to the Achievement Criteria

1. What goals did you accomplish this period? In what ways does your work connect to our overall strategy and/or mission? (**Goal Accomplishment & Job Mastery**)
2. What do you like best about your work? (**Goal Accomplishment**)
3. How have you supported others' work and/or collaborated with others on your work this period? (**Collaboration**)
4. How have you innovated to seek efficiencies or improve work outcomes? (**Innovation**)
5. How have you fostered diversity, equity, inclusion and/or belonging on our team and campus? (**Collaboration & Inclusion**)
6. What can I do as your supervisor to better support your success? What additional knowledge, resources, or tools are needed to successfully do your job? (**Development Planning & Manager Support**)

Before the Check-in Conversation

	Manager	Direct Report
Before	<ol style="list-style-type: none">1) Plan how you will apply coaching skills to check-in meeting, 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.2) Review the Achievement Criteria 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 to be successful.	<ol style="list-style-type: none">1) Reflect on 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.2) Use the Achievement Criteria check-in questions as a guide for preparing to talk about your work performance (job mastery, goal accomplishment, collaboration, innovation, and inclusion).

During the Check-in Conversation

	Manager	Direct Report
DURING	<ol style="list-style-type: none"> 1) Use the Achievement Criteria check-in questions to encourage the employee to focus on current progress and experience, in addition to future performance planning. 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. 3) To go deeper in 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. 4) During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in. 5) Be sure to check-in on goal accomplishment expectations for the next four months. Ensure alignment with team, unit, and campus strategies. 	<ol style="list-style-type: none"> 1) Use the Achievement Criteria check-in questions 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. 2) Be open to feedback, partner in problem solving, and take ownership over your achievements and areas for improvement. 3) Spend time discussing additional knowledge, skills, and support needed for success at UC Berkeley. 4) During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in. 5) Check-in on goal accomplishment expectations for the next four months.

After the Check-in Conversation

	Manager	Direct Report
AFTER	<ol style="list-style-type: none">1) Open an Achieve Together documentation form for the check-in period on your performance dashboard. Once open, it is automatically available for staff.2) Review key highlights of the conversation from your perspective and document in the Supervisor Comments section of the form.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.4) Save and finalize the form to complete your part of the check-in period.5) Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success.	<ol style="list-style-type: none">1) Open and review the form that will appear in your inbox from your supervisor.2) Review key highlights of the conversation from your perspective and document these in the Employee Comments section of the form.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.4) Save and finalize the form (signifying you reviewed the content in full) to complete the check-in period.5) Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success.

Documentation Dashboard Process

Step	Manager/Supervisor	Direct Report
1	Start and share new form for direct reports. Select conversation period. Select conversation date.	Receives form via email, ready for edits
2	Add supervisor notes/comments on guided questions for current period	Add employee notes/comments on guided questions for current period
3	Update direct report goals for next 4-month period	Review updates made by your manager/supervisor on goals for next 4-month period
4	Finalize notes/comments. All done!	Finalize notes/comments. All done!

- Shared document – both participants see updates

- In-depth user guide:

<https://docs.google.com/presentation/d/1pJUIZS2jkXj2hX3rWmsudagqTbIKst-80CBmoqSuxPE/edit?usp=sharing>

Revisiting Goals

Goals can be revisited at any time – no need to wait for a scheduled Achieve Together check-in.

However, check-ins are where goals are officially updated in the system of record.

The screenshot displays a web interface for managing performance goals. It is divided into two main sections: 'Current Goals' and 'Next Period Goals'. Each section includes a header with the date range, a paragraph of instructions, a text input field with an example goal, and three dropdown menus for selecting goal types. In the 'Current Goals' section, a red arrow points to the header, and a red circle highlights a '+ Add Goals' button. Below the goal selection area, there are sections for 'Comments on Current Period Goals', 'Supervisor Comments', and 'Employee Comments', each with a corresponding text input field. A second red arrow points to the 'Supervisor Comments' field. The 'Next Period Goals' section follows a similar layout but lacks the '+ Add Goals' button.

Current Goals (July 1, 2019 to November 30, 2019)
The goals below are from the above referenced period. Supervisors may add or modify goals as needed. For more information on goals please visit our [performance management goals page](#) where you can structure your goals appropriately.

Example: Professional Development Goal

Please consider one or more of the following goal types: Special Projects or Initiatives, Stretch Assignments, Key Job Responsibilities, Contribution (committee service, mentoring, community of practice, etc.)

Please consider one or more of the following goal types: Special Projects or Initiatives, Stretch Assignments, Key Job Responsibilities, Contribution (committee service, mentoring, community of practice, etc.)

+ Add Goals

Comments on Current Period Goals
Please provide comments on goals for the current period.

Supervisor Comments *

Supervisor Comments

Employee Comments

Employee Comments

Next Period Goals (December 1, 2019 to March 31, 2020)
Enter goals for the next period. Supervisors may add or modify goals as needed. For more information on goals please visit our [performance management goals page](#) where you can structure your goals appropriately.

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Additional Learning

Achieve Together Website

<https://hr.berkeley.edu/performance/achieve-together>