CALL FOR PERFORMANCE APPRAISALS  
Patient Care Technical Employees (EX)  
and Service Employees (SX)

SUPERVISORS AND MANAGERS:
This is the official call for performance appraisals for the following collective bargaining units: Patient Care Technical Employees (EX) and Service Employees (SX) for the January 1, 2015 - December 30, 2015 Review Period.

Employee Performance Appraisal Report (EPAR)  
All supervisors are expected to complete EPAR’s for their staff. The reporting period for EX and SX staff is January 1, 2015 through December 30, 2015.

The stipulations of each contract are as follows:
- EX = the April 2016 increase is a Range Adjustment and not associated with the completion and ranking of the appraisal. The subsequent July 2016 increase is also not associated with the completion and ranking of the appraisal.
- SX = the July 2016 increase is not associated with the completion and ranking of the appraisal.

Completed performance appraisals for the EX and SX Unit staff are due no later than Monday, February 29, 2016.

Formal employee feedback processes play a critical role in keeping our staff motivated and engaged in their work. In addition, our staff appreciates and benefits from management’s observations of work well done as well as constructive coaching regarding opportunities for improvement. Finally, this process creates a foundation for employee development and goal setting, both of which are critical to individual and organizational success. Organizationally, all goals from the highest levels of administration down to the front line employee should be aligned and in support of the highest organizational priorities and diversity and inclusion.

Listed below are the Chancellor’s highest priority goals from which all other goals should cascade:

1. **Financial Sustainability:** Further diversify our revenue sources, principally through new philanthropy, research initiatives, and collaborative partnerships. Develop short and
long-term strategies and administrative efficiencies to accommodate growth on our campus as a result of the 2020 Initiative and our vision to become the University of the 21st Century.

2. **Human Equity:** Create or enhance policies, procedures, and practices that ensure that our diverse faculty, staff, and students experience an organizational environment characterized by equity, inclusion, academic freedom, freedom of expression, social justice and a shared responsibility for supporting and enabling the success of others.

3. **Student Success:** Ensure that the educational experience of our students mirrors their diverse perspectives and needs and supports their personal and professional aspirations. Advance excellence in teaching, research and service by utilizing and investing in future innovations.

4. **Enabling Transformational Research:** Establish UC Davis as the leader in the state, nation and world in discovery and innovation in helping to solve the world’s most pressing challenges through inter-disciplinary and trans-disciplinary collaborations and partnerships.

5. **Creating a True Community of Learners:** Establish an environment where everyone—students, faculty and staff—employ learning and critical thinking to achieve excellence, and where innovation and creativity are part of everything we bring to our workplaces, our classrooms and our laboratories.

6. **Greater Efficiencies:** Continue to integrate our campus organizations and programs to improve efficiency, reduce cost and better manage risk.

Each division head should establish goals for their school/college/unit/division in support of these high-level organizational priorities. These goals then set the framework and context for manager, supervisor and employee goals. When setting goals it is important that they be “SMART” goals: **Specific, Measurable, Attainable, Relevant and Timely.** Metrics that are quantifiable and objective should be used wherever possible to assess performance.

If you have questions about the program deadlines or instructions:
**Davis Campus** – Terri De La Mora, ER Policy Analyst, 530-752-9279
**Health System** – Travis Lindsey, Health System E&LR Manager, 916-734-8878
RESOURCES & GUIDELINES FOR EPAR RATINGS

Appraisal Tools
At UCD, the online application is open now. It can be accessed through the web link http://epar.ucdavis.edu and can be accessed from the HR home page under the header “Hot Topics”. User support in the form of an online user guide and other on-demand training materials is also available and can be accessed from within the online application as well as from the Human Resources home page.

At UCDHS, you will receive an email alerting you when performance documents are available for your employees. All appraisals must be completed on-line in PeopleSoft and can be accessed from http://ehr/psp/hrprod/EMPLOYEE/HRMS/?cmd=login. Navigation is Main Menu > Manager Self Service > Performance Management > Maintain Documents. User support in the form of an online user guide and other on-demand training materials is also available at http://intranet.ucdmc.ucdavis.edu/hr/ePerformance/stepbystep.shtml, as well as from the Human Resources home page.

The Annual Evaluation process/steps/timelines:

It is expected that Davis location appraisals be completed using the online Employee Performance Appraisal Report (EPAR), and the Health System in PeopleSoft.

• Applicable: All career non-probationary EX & SX employees

• Review time period: January 1, 2015 to December 30, 2015

• Deadline for completed EPAR Appraisals: Monday, February 29, 2016

• Employee Role: Employees should prepare and submit their Summary of Accomplishments (SOA) to Supervisor (dates for employees to submit SOA is determined by supervisors in conjunction with their department review process).

• Supervisor Role: Performance management is a year-long responsibility. Supervisors are encouraged to meet quarterly with employees to review goals and progress. Specific to this EPAR reporting period:
  o Supervisors/Managers prepare draft evaluations for discussion with their staff.
  o Face-to-Face discussion and review of staff members performance, future goals, professional development goals, and diversity and inclusion (new additions to the process this year)
  o This is also a time when we ask managers to ensure that employee’s position descriptions for their staff are current and accurate as the evaluation is based on the work assigned to the employee
  o Supervisor finalizes appraisal