



DATE: May 17, 2017

TO: **Members of the Leadership Team**

FROM: Melissa Jutzi, Director Human Resources (Total Compensation)

RE: Completion of Performance Reviews for Professional/Managerial Employees

As you may be aware, the multi-year Compact between the University and the Professional Staff Association (PSA) expired on April 30, 2017. In each year of the expiring Compact, professional and managerial employees were eligible for base salary-related adjustments, which include:

- i) Across-the-board increase
- ii) Merit pay/Progression to Job Rate pool to recognize professional and managerial employees for contributions to their department and the University.

Allocation of merit/progression to job rate pay is based on performance and to be eligible for a merit/progression to job rate increase, there is a requirement for documented evidence that an annual performance planning, assessment and development process, based on the G.O.A.L. framework.

Due to the pending negotiation of a renewal Compact between the University and the Professional Staff Association (PSA), annual merit worksheets will not be distributed for the 2016/2017 performance year until such time as an agreement has been reached. While merit spreadsheet will not be distributed, it remains important to document the performance of each Professional and Managerial staff member for the 2016/2017 performance year.

The University of Guelph is committed to utilizing the G.O.A.L. (*Generating Ongoing Achievement and Learning*) framework for performance planning, assessment and development. G.O.A.L. supports the translation of organizational goals into individual, team and departmental goals, emphasizing the importance of ongoing, open communications. In addition, G.O.A.L. provides tools for managers and staff to help plan, monitor and measure progress towards work objectives and to identify professional development opportunities.

It is important to complete the annual G.O.A.L Performance Review as it sets the foundation and focus for the coming year while recognizing achievements, growth through development, and demonstration of competencies over the course of the previous year. A [competency guideline](#) has been developed as a tool for managers to use in the G.O.A.L. dialogue. This tool supports a clearer definition/articulation of the level of competency expected in key areas selected and can support the ongoing dialogue on areas for development.

In units where there are multiple managers/supervisors conducting performance assessments, it is important that there is a shared understanding and consensus amongst those managers/supervisors as to the criteria for achieving a particular performance rating prior to the reviews being undertaken. **Prior** to the outcome of performance reviews being communicated to each employee, it is **critical** that a calibration meeting be conducted by departmental leaders who can speak to the assigned ratings and performance outcomes across the College/Unit to ensure the ratings were applied fairly and consistently. Calibration meetings typically include the following three components:

- a. A review of the different ratings and their meaning
- b. Discussion of each employee's overall performance rating and the manager's rationale for the rating
- c. If necessary, an adjustment of ratings to reflect the value of the rating applied.

Tools and resources to support managers/supervisors in the G.O.A.L. process can be accessed on the Human Resources website ([G.O.A.L process, forms and resources](#)).

In response to the ongoing feedback we solicit about the G.O.A.L. process and our focus on supporting healthy, engaged and successful employees, we are working to contemporize G.O.A.L. to ensure it meets the needs to facilitate ongoing dialogue and development. Communications about changes are anticipated in sufficient time to ensure preparation for implementation May, 2018.

Should you have any questions about the G.O.A.L and/or calibration meeting process, please contact the appropriate HR Consultant at:

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Please ensure that this memo is distributed and brought to the attention of all those that supervise P&M employees.