



## Local Procedure: Senior Management Group (SMG) Performance Management

September 2023

### I. Annual Performance Evaluations

Performance evaluations will be conducted annually by the direct supervisor for each SMG member. Goals and objectives will be established for each employee holding a position, which has been designated as a participant at the commencement of or during the performance period. Goals and objectives are to clarify and delineate accountability, create opportunity for the individual to add value to the work of the unit and/or campuses, be aligned with higher-level objectives and strategies established by university leadership, and encourage growth and development of the individual. Performance will be measured relative to the attainment of the stated goals and objectives, and significant accomplishments related to the strategic goals and objectives of the University. [UC Policy 7702 – Senior Administrator Performance Management Review Process](#) provides additional information. The forms to be used during this annual process are provided below:

- A. [Senior Administrator Performance Evaluation Form](#)
- B. [Senior Administrator Self-Assessment Form](#)
- C. [Senior Administrator Performance Goals & Objectives Form](#)

### II. Five-Year Senior Leadership Development Assessment (LDA) Process

A Leadership Development Assessment will be conducted once every five years. The purpose of this assessment is to provide the Senior Management Group (SMG) member with feedback from a broader perspective than is usual with an annual performance evaluation. This is a managerial coaching and development exercise, which includes assessment of administrative effectiveness, identification of accomplishments and challenges, and discussion of progress toward campus and unit goals. Individuals who have knowledge about the quality and effectiveness of the SMG member's performance who may be solicited include individuals, as appropriate, from among the following constituents: the Academic Senate, academic unit heads, staff (including subordinates), deans, other administrators within the University, and other pertinent external groups. Our local [LDA Administrative Guidelines](#) provides guidance on our campus process.