

# Staff Performance Management Policy Update

November 2025



# Agenda

- Policy Changes Overview
- Goal Setting and Performance Appraisal Process
- Performance Improvement Plan Process



# Staff Performance Evaluations - From/To

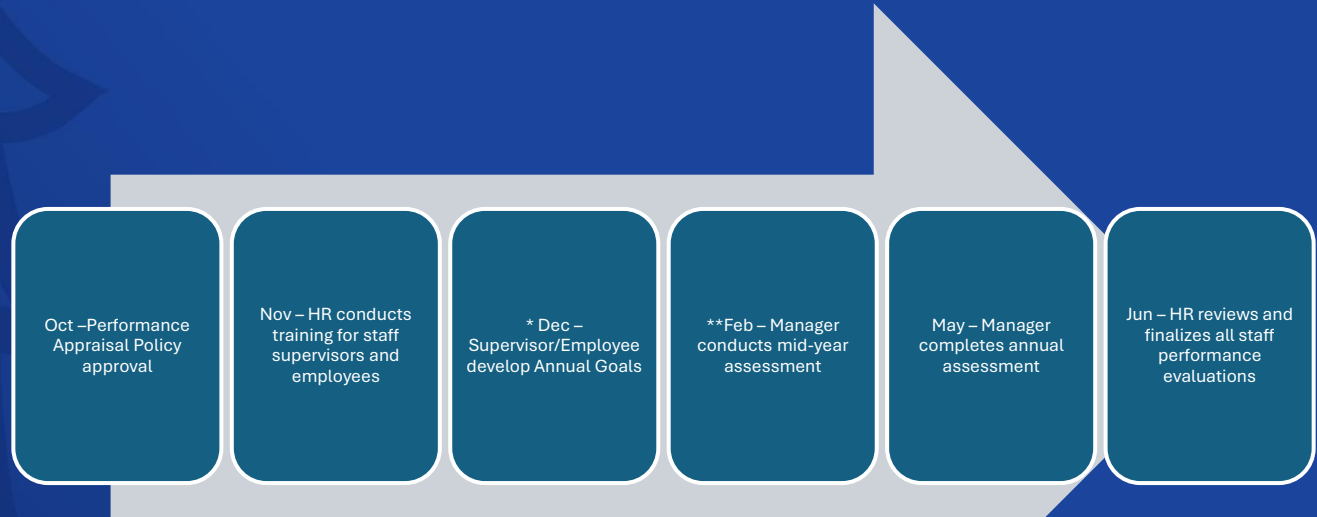
## • Current State

- Covered in 3.4 of Policy Guide - not a lot of details
- 90-day
- 180-day
- Annual thereafter
- Not in conjunction with compensation increases
- Evaluates the employee's compliance with University expectations, policies, and position job descriptions.
- Employees will be expected to review their job description and acknowledge its contents by signing a copy annually in conjunction with the annual performance appraisal.

## • Proposed Changes

- Annual performance appraisal process based on:
  - Core Performance Goals - 50%
  - Professional Development Goals - 10%
  - Common Competencies - 40%
- Goal establishment is a collaborative effort between Supervisor and Employee
- Cycle will match School Academic Calendar (1 Jul - 30 Jun)
- Conduct Mid-Year assessment
  - 90/180 day eval requirement eliminated
- Conduct Annual assessment

# Performance Evaluation Rollout Flow



\*After initial rollout, Annual Goal development will be in July

\*\*After initial rollout, Mid-Year assessment will be in December

# Staff Performance Improvement Plan - From/To

- Current State
  - No written policy in Policy Guide
  - Form utilized is very generic and lacks sufficient detail to ensure Supervisor and Employee understand required improvement areas and measures of success/expectations
- Proposed Changes
  - Create policy with specific triggers to initiate a Performance Improvement Plan (PIP)
  - Spell out responsibilities in PIP process for all parties involved
  - Create specific timelines for review and assessment
  - Provide form to document performance deficiencies, actions required, progress discussions, and final adjudication

# Performance Improvement Plan Rollout Flow

Oct –Performance  
Appraisal Policy  
approval

Nov – HR conducts  
training with all  
supervisors and  
employees

Dec – New process  
and forms go into  
effect

\*After initial rollout, Annual Goal development will be in July

\*\*After initial rollout, Mid-Year assessment will be in December

# Goal Setting and Performance Appraisal Process

- Who Does This Apply To?
  - Covered: All regular full-time and part-time staff
  - Excluded: Faculty, Probationary employees (first 90 days), temporary/contract workers, executives

- Annual Timeline:



- Performance Evaluation Factor Breakdown:



- Performance Rating Scale:

Rating	Description	Score Range
Exceptional (5)	Significantly exceeded goals	4.5-5.0 = Outstanding
Exceed Expectations (4)	Surpassed most goals	3.5-4.4 = Exceeds Standards
Meets Expectations (3)	Successfully achieved goals	2.5-3.4 = Meets Standards
Below Expectations (2)	Partially achieved goals	1.5-2.4 = Improvement Needed
Unsatisfactory (1)	Failed to achieve most goals	Below 1.5 = Unsatisfactory

# Goal Setting and Performance Appraisal Process

- SMART Goals Framework:

All goals must be:

- **S**pecific - Clearly defined expectations
- **M**easurable - Quantifiable outcomes
- **A**chievable - Realistic with available resources
- **R**elevant - Aligned with role and organizational priorities
- **T**ime-bound - Clear deadlines and milestones

- 4-Step Evaluation Process:



- Performance Improvement Triggers:

Improvement plans initiated when:

- Overall rating below "Meets Standards"
- Any single goal/competency below "Meets Standards"
- Critical goals unachieved without justification
- Consistent performance decline
- Behavioral issues impacting achievement

*See SUHR-002 for improvement plan procedures*

# Performance Improvement Plan (PIP)

- Who Does This Apply To?

- Covered: All regular full-time and part-time staff
- Excluded: Faculty, Probationary employees (first 90 days), temporary/contract workers, executives

- When to Initiation a PIP:

- Overall performance rating below 2.5/5.0 on annual/mid-year evaluation
- Any single goal/competency below 2.5/5.0
- Failure to achieve critical annual goals
- Consistent performance decline
- Behavioral issues impacting effectiveness
- Inability to perform essential job functions

- PIP Duration Options:

Type	Duration	Notes
Standard	90 days	Most common
Minimum	30 days	Specific issues only
Maximum	120 days	Complex issues
Extension	+30-60 days	HR Director approval required

# Performance Improvement Plan (PIP)

- Required Approvals (In Order)
  - Immediate Supervisor → Recommends PIP
  - Next-Level Supervisor → Approves recommendation
  - HR Director → Must approve ALL PIPs
  - Senior Leadership → For potential terminations



# Performance Improvement Plan (PIP)

- Before Starting: Supervisor Checklist
  - Document specific deficiencies with examples
  - Review previous feedback/coaching attempts
  - Consult with HR for compliance
  - Consider alternative solutions
  - Verify adequate training/resources provided
- Required PIP Components
  - Specific performance deficiencies identified
  - Measurable improvement goals (SMART format)
  - Timeline with milestone checkpoints
  - Support resources/training commitments
  - Regular monitoring schedule
  - Success/failure consequences
  - Employee acknowledgment signature

# Performance Improvement Plan (PIP)



- Monitoring Schedule (Standard 90-Day PIP)

Milestone	When	Purpose
Weekly Check-ins	Every week	Progress tracking (minimum 30 min)
30-Day Review	Day 30	First milestone assessment
60-Day Review	Day 60	Mid-point evaluation
90-Day Review	Day 90	Final assessment

- Success Criteria:

- At least 3.0/5.0 rating on all improvement goals
- Meet all milestone targets throughout period
- Show consistent progress and sustained improvement
- Demonstrate proactive engagement
- Maintain professional conduct

# Performance Improvement Plan (PIP) Outcomes

-  **Successful Completion**
  - Return to normal performance cycle
  - PIP docs remain in file through next appraisal
  - 6-month continued monitoring period
  - Eligibility for merit increases restored
-  **Unsuccessful Completion Options**
  - Extension: 30-60 days with revised goals (HR approval)
  - Role Modification: Transfer to better-suited position
  - Demotion: Reduced responsibilities/compensation
  - Termination: End employment relationship

# Wrap Up

- We will start following these policies once all Staff Managers and Employees have been trained on these new processes and expectations - Goal is December 2025
- Please reach out to HR if you have any questions or need any assistance

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*Flight*



**SPALDING**  
GOLDEN EAGLES  
*HR*