

03.402 Staff Development / Performance Planning and Review

1. Purpose. The Staff Development/Performance Planning and Review Program provides managers and supervisors a tool to improve morale, decrease turnover, increase efficiency and improve performance of University of North Texas System staff through a systematic process of performance planning, feedback, and review based on evaluation of results achieved against specific, measurable standards.
2. Policy. It is the policy of the System that staff job performance plans and standards are established and followed. The job performance plan and standards will be the basis for review of staff performance and for staff development. Job performance evaluations will be used as factors in management decisions regarding promotions, merit or lump sum pay increases, disciplinary actions, and/or layoffs.
3. Performance Plan and Standards. Managers and supervisory staff are responsible for ensuring that job tasks have been accurately identified and that valid performance standards are established and followed with appropriate input from affected staff. Each job will be defined by Key Result Areas outlining the major functions performed, beginning with the most important. Under each Key Result Area, tasks/duties will be listed. Realistic performance standards for the successful performance of each task/duty will be established. Departmental standards or work rules will be incorporated in the standards of performance. Performance plans are to be reviewed and updated periodically by the department as appropriate.
 - a. Performance Standards for supervisory staff shall include performance criteria related to supervision and evaluation of employees supervised, using the Staff Development program or other means as appropriate to the category of employment.
 - b. Performance standards for management staff shall include performance criteria related to promoting diversity within their division and to support University programs designed to create a welcoming environment for everyone, using the Staff Development program or other means as appropriate to the category of employment.
 - c. Performance standards for executive staff shall include performance criteria related to providing leadership and oversight of institutional effectiveness efforts in their division including the use of evaluation results and linking results to planning.

4. Performance Agreement Meetings. At the start of each review period, a performance agreement meeting should be held between the reviewing supervisor and the employee to discuss the performance plan document and to plan any specific goals for the review period.
5. Progress Reviews. Supervisors at all levels should hold regularly scheduled conferences with staff members. At least one progress review is recommended during the review period. The progress review meeting may be used to assess progress only, or to discuss changes in the performance plan, which have occurred during the review period, or to discuss problems in performance; and should be documented in writing using the appropriate form.
6. Probationary Performance Reviews. As provided in the "Probationary Period", Policy Number 1.3.11, the probationary period begins with the date of employment and continues for a period of six months. Prior to the end of the probationary period, a performance review and rating is requested by UNT Human Resources and submitted by the staff member's supervisor. Supervisors must recommend that the staff member be removed from probationary status or be dismissed prior to completion of probationary status.
7. Annual Performance Reviews. After staff members complete their probationary period, performance reviews and ratings are requested at the completion of the first year of employment and annually thereafter based on the date of employment, or based on an alternative annual review date as determined by the department.
8. Special Performance Reviews. Special reviews may be done at any time the staff member's job performance warrants this action, as in the case of severe performance problems.

9. Rebuttals to Performance Review Ratings. A staff member may file a rebuttal to any regular or special performance review by memorandum within 15 days from the date the performance rating was shared with him/her. The rebuttal should be addressed to the supervisor. A copy of the rebuttal is to be sent to the UNT Director of Human Resources by the employee. The copy of the rebuttal memorandum will be filed in the staff member's official personnel file; however, no action will be taken by UNT Human Resources. Any formal complaint, or grievance if the employee is eligible, must be filed in accordance with the Complaint and Grievance policy.
10. Performance Review Recordkeeping. The completed Performance Planning and Review and Planning Guide, plus any supporting documentation must be forwarded to the UNT Human Resources Department to be filed in the staff member's personnel file. Departments should keep a copy of the review and provide a copy to the employee.
11. Staff Exempted from Staff Development. Administrative officials reporting directly to the Chancellor are exempted from review under the Staff Development Program. The Chancellor interacts with senior administrative staff on a daily basis and periodically renders informal evaluations. Administrative officials reporting to a Vice Chancellor are not exempted from the program but may be reviewed through a memorandum report rather than the rating process. Classified employees reporting to a Vice Chancellor are not exempted from review under the Staff Development Program. The Chancellor may approve an exemption from Staff Development for other classes of employees or for individual positions, as appropriate.

Note: Further information regarding Staff Development procedures and forms may be found in the *UNT Staff Development: Performance Planning and Review Manual*.

