

Office of Human Resources

Staff Performance Appraisal Manual

Palm Beach State College

Performance Appraisals in Workday



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1 Introduction

With an emphasis on Palm Beach State College's strategic priority on all aspects of human resource management, a carefully planned system for reviewing the job performance of employees becomes a critical and essential part of our human resource programs. In addition, the process of planning and conducting performance appraisals is an important leadership function of all employees who supervise others.

This manual is intended to guide in administering performance appraisals for staff that is meaningful. Please contact the Human Resource Business Partner on your campus with any questions regarding the information contained in this document or if you need any assistance with the appraisals. For additional information refer to:

- a. Board Policy [6Hx-18-5.42](#), *Performance Appraisal of Full-time and Part-time Employees*; and
- b. *Procedure for Performance Appraisals* [6Hx-18-5.42P](#).

For faculty performance appraisals, refer to the faculty and instructor performance appraisal guidelines on the [HR Forms and Documents web page](#).

1.1 PERFORMANCE APPRAISALS AS A LEADERSHIP OPPORTUNITY

Effective and meaningful performance appraisals take thought, preparation, and time. If done properly, the performance appraisal process is one of the best opportunities to display leadership skills in assisting employees to reach their full work potential. The way supervisors assess an employee's performance can make a difference in the employee's overall job performance, motivation, morale, and career development. During the performance appraisal process, supervisors have the opportunity not only to reflect on an employee's past performance but also to work with the employee in planning for their future at the college and professional development. In the process, supervisors will be able to recognize an employee's accomplishments, give candid feedback about areas that need development, and establish a performance improvement plan. By taking a leadership role in the review process, supervisors can make a significant contribution to the high level of work performance of employees at the college.

1.2 PURPOSE OF PERFORMANCE APPRAISALS

A carefully planned performance appraisal system serves many purposes that benefit both the college and the employee. Specifically, the performance appraisal should:

1. Serve as an instrument for the employee to outline their accomplishments and goals.
2. Serve as an instrument for the supervisor to give feedback to the employee on work performance.
3. Serve as an aid in improving communication regarding work performance and expectations between the employee and the supervisor.
4. Serve as an instrument for the supervisor and employee to establish specific goals and objectives and/or plans for projects, committees, or other activities that contribute to the department and the college.

5. Serve as a motivation for improved employee performance.
6. Serve as an aid in identifying professional development/training needs.
7. Serve as a source of information for applicable administrative decisions, such as promotion and continued employment.
8. Serve as a source of documentation.

Because the impact of any one of these listed purposes can have a major effect on the work performance and morale of employees, the necessity of conducting meaningful and effective performance appraisals cannot be overstated.

1.3 PERFORMANCE APPRAISAL PROCESS

The actual process of reviewing performance should be part of day-to-day communication between the supervisor and the employee. On an ongoing basis, the supervisor and the employee should discuss the employee's performance against established job duties and/or objectives and standards. Throughout the year, the supervisor should point out specifically the areas in which the employee is performing well and those in which the employee needs to improve. Reinforcing and recognizing high levels of job performance makes employees feel good about their work accomplishments and enhances motivation. It is also important for employees to receive ongoing feedback about performance areas needing improvement so that an employee is aware of the problems and can work toward correcting them. There should be no surprises for the employee during the formal performance appraisal. Surprises often cause employees to have hard feelings, which may result in low employee morale, complaints, etc. The components of the ongoing performance appraisal process include:



1.4 PERFORMANCE APPRAISAL CYCLE

Open communication between a supervisor and an employee about performance should be ongoing. Supervisors are required, on an annual basis, to complete written performance appraisals on all regular employees who report to them.

Stage	Probationary	Workday Performance Appraisal
New hire – 180 days	Up to 180 calendar days of employment	Complete the probationary performance appraisal
Promotion or transfer	Up to 180 calendar days of employment	Complete the probationary performance appraisal
After one year of employment	Not applicable	Complete performance appraisals each year on or before August 31

1.5 PERFORMANCE APPRAISALS FOR INTERIM ROLES

Regular employees serving in an interim role receive a performance appraisal. Temporary employees serving in an interim role do not receive a performance appraisal. The chart below outlines employee eligibility and status:

Description	External Interim	Internal Interim
Definition	The incumbent was hired into or moved into an interim role, and the incumbent is temporary	The incumbent is a regular employee who moved into an interim role
Does the employee receive a performance appraisal?	The employee does not receive a performance appraisal	The employee receives an annual performance appraisal

2 Performance Appraisal Overview

2.1 PERFORMANCE APPRAISAL PRINCIPLES

The following general guidelines will help supervisors to conduct meaningful and effective performance appraisals:

1. Prepare for and schedule the performance appraisal in advance. Let the employee know well in advance when the review will take place so that the employee will have adequate time to prepare. Emphasize to the employee that you value their input and welcome any suggestions that the employee may have for you to enhance their performance or to remove any barriers that impact the employee's performance.
2. Throughout the year, be sure to review the employee's progress on job duties and responsibilities, as outlined in the employee's job description, and any established performance objectives or required projects.
3. Supervisors who maintain notes and/or documents to develop the performance appraisal will need to preserve the notes. Documents may be uploaded to the performance appraisal in Workday.
4. Strive for honesty and accuracy. If you have any doubts about any information that should or should not be included in the performance appraisal, or if you have any reservations about ratings or any other concerns, do not hesitate to consult your next line supervisor or the Office of Human Resources.
5. Find a quiet, private place for the performance appraisal meeting. If possible, don't cancel the meeting because of other duties. Avoid interruptions. Making the performance appraisal meeting a priority is an important message to send to the employee.
6. Create a supportive environment to put employees at ease. Many employees have grave apprehensions about the performance appraisal process. Reassure the employee that you view the performance appraisal process as a positive method to encourage constructive feedback about job performance.
7. Watch your body language and be aware of its impact on others so you do not inadvertently send the message that you are impatient or not interested and want to move to other things.
8. Make the performance appraisal meeting a process of two-way communication. Express an interest in the employee's self-assessment and encourage the employee to share perceptions of their job performance. Listen to the employee, even if their perceptions are different from yours. A good rule of thumb during the performance appraisal meeting is to listen more than you talk. A performance appraisal meeting should not be a lecture. Be clear, direct, and honest in your communication. It is acceptable to alter your opinion about an employee's job performance based on additional, previously unknown information that the employee may share with you. Also, if you don't agree with the employee, it is appropriate to keep your rating the same.

9. Focus on job performance, not on the employee. Even if the employee is not performing well, make it very clear that you are evaluating job performance and not the person. One sure way to create difficulties in the review is for the employee to feel attacked personally.
10. Support the performance appraisal with specific examples. Filling out the comment section at the end of the performance appraisal is critical to conducting a meaningful, performance appraisal. Comments give meaning to the ratings.
11. Give both positive and negative feedback where applicable. Focus on job performance and not the person; do not hesitate to acknowledge good performance and to give constructive criticism of performance that needs improvement.
12. If the employee is reticent to talk during the performance appraisal meeting, use open-ended questions, which require more than a yes or no answer. Examples of open-ended questions are: "Why do you think we have departmental difficulties in administering the program?" or "What suggestions do you have to improve our reporting system?" Asking questions not only gets the employee talking but also shows that you value the employee's ideas.
13. Sometimes during the performance appraisal process, an employee may identify a personal problem that negatively impacts work performance. If you believe it to be appropriate based on the nature of the issue identified, feel free to remind the employee that the college has a confidential Employee Assistance Program (EAP) that offers free counseling sessions for a variety of problem areas, including marital, grief, financial, alcohol, etc. Offer support, but do not try to diagnose or solve the problem. If you suspect a personal problem, but the employee has not identified one to you, do not accuse or assume. Instead, focus on the performance and allow the employee to share the reason for the performance problem. If the employee does not identify a personal problem, you should not either. Rather, ask the employee what their plans to do to improve performance and what you as the supervisor can do to help.
14. At the close of the performance appraisal meeting, sum up what was discussed during the meeting. Ask the employee if they have any questions or concerns.
15. For any Unsuccessful areas, a Performance Improvement Plan is required and must be completed in Workday and presented with the performance appraisal. It is imperative that an employee knows specifically what they need to do to improve performance and is given a timeframe for follow-up. The performance improvement plan is critical to conducting meaningful and effective performance appraisals.
16. Acknowledge the accomplishments, committee work, completion of projects and/or established goals, and professional development that the employee completed during the year.
17. Discuss with the employee committee work, professional development, projects, goals, and performance objectives for the upcoming year for the review process.
18. If the communication between you and the employee deteriorates during the performance appraisal meeting and you feel that continuing the meeting would be unproductive, do not hesitate to reschedule another meeting. Explain to the employee that for a constructive and productive meeting to take place both of you should regroup and meet again very soon.

19. If an employee states that they do not want to acknowledge the performance appraisal, emphasize to the employee that an acknowledgment only means that the appraisal meeting occurred, and it does not signify agreement. If the employee still refuses to acknowledge the appraisal, contact Marcia Grabarczyk, Delicia Marshall, or Kara Lee in the Office of Human Resources.

Employee may submit their comments in Workday regarding the performance appraisal within fourteen (14) working days. These comments will be part of the performance appraisal.

2.2 HOW TO GIVE CONSTRUCTIVE FEEDBACK

Constructive feedback not only helps employees do their work more effectively but also improves communication between the supervisor and the employee. When specific and accurate information is provided constructively, both employees and supervisors can improve or make changes.

All employees who are performing competently should receive praise and encouragement. Those who are not performing at the expected level should be informed of any problems and coached on how to improve. Apprising employees of good performance helps maintain their motivation and signals them to continue in this direction. Positively communicating with employees when they need to improve their performance will help prevent chronic work problems and minimize surprises during the performance appraisal process. It is important to remember that both positive and corrective feedback should be given as close as possible in time to when the relevant performance occurs.

Positive feedback is defined as providing feedback to someone who has done something well and deserves praise for their efforts. In providing positive feedback, the following general rules should be followed:

1. Respect the individual's privacy by choosing a time and place to speak without interruptions or being overheard by others. However, there may be occasions when it is appropriate to praise an employee publicly.
2. Clearly describe what the individual did to deserve praise.
3. Express appreciation and explain how the performance helps in the achievement of the employee's duties and responsibilities and overall accomplishments of the department and/or college.

Corrective feedback is defined as providing feedback to someone who has not done something well and who requires some corrective action to improve performance. Effective corrective feedback is provided in a constructive way that will continue to motivate the individual. In providing corrective feedback, the following general rules should be followed:

1. Identify exactly why the problem causes difficulty for the unit and cannot be allowed to continue.

2. Ask for the person's help in resolving the problem and discuss the ideas they offer for its solution.
3. Reach an agreement on specific actions that each person will take to solve the problem. Confirm this agreement by restating it and by assigning a specific time frame or deadline to complete the action. Schedule a follow-up meeting to examine the effectiveness of these actions.
4. Never threaten the individual with ambiguous consequences if the behavior doesn't change, e.g., "Shape up or you'll be very sorry." The purpose is to motivate a change in behavior for positive reasons. Stronger steps can and should be taken through the disciplinary process if the behavior does not change.
5. If the performance does not improve, the manager should document the performance problem. Utilize the employee counseling and/or improvement plan in Workday to document performance issues.

2.3 SETTING GOALS

Setting goals can be an important part of the performance appraisal process. It is an excellent time for the supervisor and employee to assess individual, departmental, and college needs for the upcoming year. In setting goals, emphasis should be placed on the college's strategic plan, improvement of the individual's performance, and accomplishment of departmental or college objectives. Setting goals is a two-way process, and it is important that the employee understands the importance of the objectives and commits to them.

Even though there may be numerous performance objectives that could be set for some positions, limit performance objectives to what is most important. Once established, a supervisor and employee need to discuss the performance objectives over the course of the year. Not only is the feedback important to the employee, but it is also critical to assess if any changes to the performance objectives need to be made due to a change or shift in individual, departmental, or college needs. If there are any changes to the goals over the year, these changes must be made in Workday.

As a general guideline, strive to set SMART performance objectives:

S	Specific	Expectations should describe specific behaviors that are required for job performance.
M	Measurable	Expectations should allow for objective monitoring and measurement.
A	Achievable	Expectations should be realistic for the employee to attain and accomplish.
R	Realistic	Expectations must be relevant and within reach to the requirements of the current position, department, and/or college.
T	Timely	Expectations should be trackable by either the manager or the employee to allow for the monitoring and evaluation of performance levels.

2.4 PROFESSIONAL DEVELOPMENT PLAN

To the fullest extent possible, the college supports the professional development of all employees. The performance appraisal process is the natural time for the supervisor and the employee to focus on the professional growth of the employee. The performance appraisal process provides supervisors and

employees with the opportunity to assess what professional development activities were completed during the year and to discuss plans for the next performance appraisal cycle.

2.5 PITFALLS TO AVOID

Because it is important that the performance appraisal process is constructive and that it enhances employee motivation, supervisors should be aware of common pitfalls. Research shows that these pitfalls can cause employee anger, loss of employee morale and motivation, as well as a formal complaint. These pitfalls include:

Evaluator Errors	Remember...
The supervisor does not communicate to the employee the job expectations and performance standards before the formal review.	Employees must be clear on what is expected of them at the beginning of each performance appraisal cycle. Surprising the employee with expectations that were never discussed before the formal performance appraisal meeting may cause the employee to become discouraged or even angry.
The supervisor does not adequately prepare for the formal performance appraisal. A supervisor who displays little thought given to the performance appraisal process by not spending enough time on the form, not completing it promptly, or by not citing specific examples, etc., may demoralize the employee.	Performance appraisals are important to employee motivation and enhanced productivity and conducting meaningful performance appraisals is a critical part of a supervisor's job responsibilities.
The recency error occurs when the performance appraisal is based largely on the employee's most recent performance, good or bad, rather than on performance throughout the review period. The recency error results in biased evaluations.	An accurate and fair performance appraisal must be based on an employee's performance over the course of the entire performance appraisal year. Keep a record of the employee's accomplishments during the year and specific examples of what the employee does well and what they need to improve.
The halo error occurs when a supervisor judges an employee favorably or unfavorably based on one strong or weak point on which the supervisor places a high value.	To conduct an accurate and fair review, the supervisor must evaluate each Performance Competency independently from the other. Be as objective as possible. Just because the employee is very good, or very poor in one Competency, does not mean that the same holds for other Competencies.
The central tendency error occurs when the supervisor is reluctant to assign either high or low ratings, when appropriate, but instead chooses to rate all employees as successful.	Be as honest as possible in the ratings. Citing specific examples, give an employee a high rating if it is deserved; likewise, give a low rating, citing specific examples, if it is deserved.
The leniency or strictness error occurs when the supervisor gives either extremely high or low ratings when not appropriate.	Be as honest and as accurate as possible in the ratings. The leniency error is far more common than the strictness error. An attempt to spare an employee's feelings or to avoid an employee's dislike

	of or anger against the supervisor by inflating ratings will only cause future problems.
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3 Performance Appraisals

3.1 PROBATIONARY PERIOD RATINGS

Two rating categories are used for the probationary performance appraisal (180 calendar days). The ratings and definitions are as follows:

Satisfactory Performance	Performance meets job standards and expectations.
Unsatisfactory Performance	Performance is at a level below established job standards and expectations.

Follow these general instructions for the probationary performance appraisal.

- Section 1 – Competencies:** The supervisor rates behaviors, skills, and competencies in which employees engage in the performance of their job.

Supervisor Comments: This is a critical part of the performance appraisal process that allows the supervisor to give specific feedback.

Recommendation: The supervisor recommends the employee continue employment or not continue employment.

Performance Improvement Plan: If the employee is recommended for continued employment and received an Unsatisfactory rating, the supervisor initiates a Performance Improvement Plan. Employees need to know what they should change in their performance/behavior to improve. This is an opportunity for the supervisor and employee to identify specifically the area(s) of performance that need to be improved and to establish a timeframe for follow-up. In following up with the employee regarding performance areas that need improvement, it is important to document the employee's progress. On all staff reviews, if any performance competencies are marked Unsatisfactory, the employee must be placed on a Performance Improvement Plan.
- Section 2 – Acknowledgement:** Both the supervisor and employee acknowledge and date the performance appraisal to indicate that it was completed and that a performance appraisal interview has taken place. The employee's acknowledgment does not represent total agreement with the completed appraisal; it only indicates the performance appraisal was administered.
- Section 3 – Employee Comments:** Employees may submit comments in Workday within fourteen (14) working days after receiving the performance appraisal. The comments become part of the performance appraisal.
- Completed Probationary Performance Appraisal:** The probationary performance appraisal is automatically placed in the Performance section of the employee's profile in Workday and may be viewed by the employee and supervisor.

3.2 ANNUAL PERFORMANCE RATINGS

Five rating categories are used for the annual performance appraisal. The ratings and definitions are as follows:

<p>Exceedingly Successful This rating is seldom used (5%).</p>	<p>Employee is leading performance, and their work has a far-reaching impact on moving the department ahead on significant goals. Performance far exceeds position standards and expectations. Performance is exemplary and demonstrates a mastery level of skill and competency.</p> <p>The supervisor must provide a supporting statement within the competency.</p>
<p>Highly Successful Some employees will receive this rating (10%).</p>	<p>Employee accomplishments exceed expected department goals and results. Performance fully achieves and frequently excels in position standards and expectations. Performance is outstanding and demonstrates a robust level of skill and job competency.</p>
<p>Successful Most employees will receive this rating (70%).</p>	<p>Performance fully achieves position standards and expectations. Performance is strong and demonstrates a high level of skill and job competency. Employee's contribution to the success of the department is valuable in achieving the department's goals.</p>
<p>Somewhat Successful Some employees will receive this rating (10%).</p>	<p>For new employees or new to the position, this rating can be used to demonstrate that the employee is still getting acclimated to the position and job duties.</p> <p>For established employees, performance sometimes meets job standards and/or expectations. Meets most performance objectives and job expectations but some areas fall short of being fully successful.</p>
<p>Unsuccessful This rating is used for performance that requires improvement (5%).</p>	<p>Performance is at a level below established job standards and expectations. Demonstrates a lack of adequate job knowledge and job competency.</p> <p>The supervisor must contact Human Resources before administering this rating. The supervisor must provide a supporting statement within the competency and place the employee on a Performance Improvement Plan.</p>

Follow these general instructions for the performance appraisal.

1. **Section 1 – Employee Self-Assessment:** The purpose of the self-assessment is to have the employees think about and give serious consideration to their job performance and accomplishments, and state goals for the upcoming year. Employees must complete their self-assessment between April 1 to June 30. The supervisor should not delay the performance appraisal if the self-assessment has not been completed by the specified deadline. If the self-assessment is not completed by the end of the day on June 30, the supervisor will receive a blank self-assessment. This will negatively impact the employee's performance appraisal rating unless there was an issue beyond the employee's control.
2. **Section 2 – Competencies:** The supervisor rates behaviors, skills, and competencies in which employees engage in the performance of their job between July 1 to August 31. If an employee is

rated as Exceedingly Successful on any performance competency, the supervisor must provide a supporting statement within the competency. If an employee is rated as Unsuccessful on any performance competency, the supervisor must provide a supporting statement within the competency and place the employee on a Performance Improvement Plan. Supervisors who do not submit completed performance appraisals by August 31, will be negatively impacted by their performance appraisal.

Overall Evaluation and Supervisor Comments: The overall rating should accurately reflect the culmination of the ratings of the performance factors or job duties. In situations where job performance is Unsuccessful, the supervisor may choose the best indicator of the employee's overall performance.

The comment section is a critical part of the performance appraisal process that allows the supervisor to give specific feedback on what the employee did well and what needs to be improved.

Performance Improvement Plan: The performance improvement plan is critical in assisting the employee to improve areas that have been identified as Unsuccessful. Employees need to know what they should change in their performance/behavior to improve. This is an opportunity for the supervisor and employee to identify specifically the area(s) of performance that need to be improved and to establish a timeframe for follow-up. In following up with the employee regarding performance areas that need improvement, it is important to document the employee's progress. On all staff reviews, if any performance competencies are marked Unsuccessful, the employee must be placed on a Performance Improvement Plan.

3. **Section 3 – Goals:** Workday enables employees and supervisors to enter goals. Employees may include goals discussed with their supervisor. Supervisors should complete this section after reviewing what the employee has written in Section 1. The supervisor lists objectives, projects, committees, and professional development activities that the supervisor and the employee have agreed upon for the next performance appraisal year. If there is a disagreement between the supervisor and employee regarding plans for the next performance appraisal year, these must be discussed, and the employee understands the goals and action plan set forth.

The Goals section of the President's Cabinet Performance appraisal states that President's Cabinet members will receive a separate document from IRE regarding their goals.

4. **Section 4 – Acknowledgement:** Both the supervisor and employee acknowledge and date the performance appraisal to indicate that it was completed and that a performance appraisal interview has taken place. The employee's acknowledgment does not represent total agreement with the completed appraisal; it only indicates the performance appraisal was administered. Performance appraisals are due on August 31 of each year.
5. **Section 5 – Employee Comments:** Employees may submit comments in Workday within fourteen (14) working days after receiving the performance appraisal. The comments become part of the performance appraisal.

6. **Completed Performance Appraisal:** The performance appraisal is automatically placed in the Performance section of the employee's profile in Workday and may be viewed by the employee and supervisor.
7. **Interim Employee:** Regular employees serving in an interim role receive a performance appraisal. Temporary employees serving in an interim role do not receive a performance appraisal.

4 Compliance Strategies

Performance appraisals must be administered accurately and fairly. To accomplish this, the supervisor must:

1. Have actual knowledge of the employee's performance, which must be acquired over a reasonable amount of time.
2. Explain the ratings and standards to the employee.
3. Objectively and specifically assess the performance of the employee, using specific examples, and avoiding generalizations. Point out specifically in which areas of performance the employee did well and where they need to improve.
4. Focus on job performance and not the person; avoid letting personal friendship, dislike, or any bias against an employee affect the assessment of performance.
5. Be clear, direct, and honest; do not be afraid to give poor ratings when they can be substantiated with specific examples.
6. Do not let the rating of an employee's performance in one area spill over into another; judge each area separately.
7. Do not prepare the performance appraisal as a last-minute attempt to justify a termination if there is little or no earlier documentation of performance problems. Throughout the year supervisors need to appropriately document incidences of poor performance, absenteeism, etc., and place copies of this documentation in the employee's personnel file.

The necessity of conducting fair, accurate, and timely performance appraisals cannot be overstated. Performance appraisals that do not follow the above guidelines serve neither the employee nor the college.

5 Frequently Asked Questions

- 1. How long must an employee be with the college before receiving a performance appraisal?** A newly hired employee is on a probationary period for up to 180 calendar days of employment. Within this time, the staff member must receive a probationary performance appraisal. The probationary appraisal may be administered at any time up to 180 days.
- 2. Does an employee who is promoted or transferred receive a performance appraisal?** When a current employee is promoted to, or transfers to, another position within the college, the employee is subject to a probationary performance appraisal within 180 calendar days of the change in position. There are instances when a transfer would not require a probationary performance appraisal. This occurs in situations when the supervisor and job duties remain the same, and the position number is the only change.
- 3. Are employees required to complete the self-assessment?** Employees must complete a self-assessment before the supervisor completes the annual performance appraisal. Employees complete the self-assessment between April 1 to June 30. The supervisor should not delay the performance appraisal if the self-assessment has not been completed by the specified deadline. If the self-assessment is not completed by the end of the day on June 30, the supervisor will receive a blank self-assessment. This will negatively impact the employee's performance appraisal rating unless there was an issue beyond the employee's control.
- 4. I have only been supervising my staff for a short time, should I still complete the performance appraisal?** Yes, all regular employees must receive a performance appraisal. The review period will be for the length of time the new supervisor has worked with the employee.
- 5. Does the employee have to acknowledge the performance appraisal?** The employee should acknowledge the appraisal. The employee's acknowledgment indicates that the performance appraisal was administered, it does not indicate agreement. If an employee states that they do not want to acknowledge the performance appraisal, emphasize to the employee that an acknowledgment only signifies that the appraisal meeting occurred, and it does not constitute agreement. If the employee still refuses to acknowledge the appraisal, contact Marcia Grabarczyk, Delicia Marshall, or Kara Lee in the Office of Human Resources.
- 6. If an employee is rated Unsuccessful in any of the performance competencies, is a Performance Improvement Plan required?** For any Unsuccessful areas, a Performance Improvement Plan is required and must be completed in Workday. It is imperative that an employee knows specifically what they need to do to improve performance and is given a timeframe for follow-up. The performance improvement plan is critical to conducting a meaningful and effective performance appraisal.

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