HR Design Performance Management Midpoint

BACKGROUND

The Human Resources Design (HRD) project was initiated after the 2011-2013 Wisconsin State biennial budget authorized the creation of a new human resources system for the University of Wisconsin-Madison separate from UW System's. One of the policies being developed as part of this process is the "Performance Management Expectations for Managers and Supervisors" policy.

The wording of the original policy accepted by the faculty University Committee (UC) and classified staff, read in part:

> Each division is required to develop, implement, monitor and maintain a performance management program for the employee groups listed above ("Who This Policy Applies To"). Subject to OHR approval, each division has the flexibility to develop a program or multiple programs that best meet the needs of its particular environment, within the parameters of this policy. At a minimum, each program needs to include the following:
>
> …
>
> 3. Mid-point conversation. Managers/supervisors should conduct a mid-point feedback and coaching conversation approximately midway through a new employee's probationary/initial evaluation period and midway through each performance year thereafter. Mid-point conversations must be documented and identify whether the employee's performance is meeting expectations.

The Academic Staff Assembly amended the document on May 12, 2014 to strike section 3.

Due to differing versions of the policy accepted by the faculty, academic staff, and classified staff, this summer an ad hoc joint subcommittee of academic staff (one person from ASEC and one person from academic staff at large) and the Classified Staff Executive Committee (CSEC) was formed to reach a compromise regarding section 3.

The following changes were made to the section by the ad hoc committee:

- The first sentence was removed and will be placed in the new policy on probationary periods.
- The word "feedback" was substituted for "conversation."
- It is now explicitly stated that a checkbox may suffice for documentation of this event.

Section 3 of the policy now reads:

> 3. Mid-point conversation. Approximately midway through each performance year mid-point feedback must be documented and identify whether the employee's performance is meeting expectations. (e.g. a checkbox indicating that performance is meeting expectations).

This version of the policy was recommended for Classified Staff Congress adoption by the CSEC on August 7, 2014.

Motion (For Vote)
Be it resolved that the Academic Staff Assembly accepts section 3 of the "Performance Management Expectations for Managers and Supervisors" policy.