



Policy Chapter: Chapter 5 Human Resources

Policy Number and Title: 05.043 Staff Development/Performance Planning and Review

I. Policy Statement

Staff performance evaluations are conducted to communicate and document the staff member's overall performance during a review period, to provide regular feedback and coaching on performance, recognize meritorious performance, identify those areas needing improvement, set specific objectives for staff to support the achievement of goals consistent with the University of North Texas mission, and provide an opportunity to discuss career goals and the support needed to meet those goals.

II. Application of Policy

All regular staff employees

III. Policy Definitions

A. Business Day

"Business Day," in this policy, means Monday through Friday during regular University business hours (8 am to 5 pm).

B. Performance Evaluation

"Performance Evaluation," in this policy, means a formal and productive procedure to measure and document an employee's work and results based on established performance standards, and goals, generally occurring annually.

C. Performance Standards

"Performance Standards," in this policy, means specific, objective, and observable performance expectations for employee roles and responsibilities, which are set by management to establish success indicators.

D. Progress Review

"Progress Review," in this policy, means an informal and productive process to discuss progress on goals and performance to date, held on intervals occurring in between performance evaluations.

E. Regular Staff Employee

"Regular Staff Employee," in this policy, means an individual who is employed full-time or part-time, scheduled to work at least twenty (20) hours per week for a period of at least 4 ½ months and is not employed in a faculty appointment or a position for which the employee is required to be a student as a condition of employment.

F. Supervisory Staff

“Supervisory Staff,” in this policy, means a regular staff employee who is the designated supervisor of record for other employees.

IV. Policy Responsibilities

A. General

1. It is the policy of the University that performance standards and goals are established and followed. The performance standards and goals will be the basis for staff performance evaluations and staff development. Performance evaluations also assist supervisors in evaluating their workforce, identifying employee potential, and establishing priorities for training, education, workforce planning, compensation, and reward.
2. Staff performance evaluations shall be based only on lawful, job related and non-discriminatory criteria and on evaluation of results achieved against specific, objective, measurable and consistently applied standards. Performance standards, goals, and performance evaluations which would discriminate against, limit, segregate or classify an employee in a manner that would deprive or tend to deprive an individual of any employment opportunity or adversely affect in any other manner the status of the employee because of race, color, national origin, religion, sex, sexual orientation, gender identity, gender expression, age, disability, genetic information, veteran status, or any other characteristic protected under applicable federal or state law are prohibited.

B. Performance Standards and Goals

1. Regular Staff Employees
 - a. Supervisors are responsible for ensuring that performance standards have been accurately identified and documented and that specific and objective goals are established and followed with appropriate input from affected staff. Departmental standards may be incorporated in the staff member’s goals.
 - b. Performance Standards and goals are to be reviewed and updated periodically by the department as appropriate. When revision of performance standards or goals becomes necessary, the supervisor is responsible for communicating revision to the staff employee at the time that the revision is effective.
2. Supervisory Staff Employees
 - a. Performance standards for supervisory staff shall include performance criteria related to supervision and evaluation of employees supervised.
 - b. Performance standards for supervisory staff shall include performance criteria related to promoting diversity within their department and to support University

programs designed to create an inclusive environment for everyone, using the staff evaluation program or other means as appropriate to the category of employment.

- c. Performance standards for Administrative officials reporting to the President, and supervisory staff reporting directly to a Vice President, shall include performance criteria related to providing leadership and oversight of institutional effectiveness and diversity and inclusion efforts in their division including the use of evaluation results and linking results to planning.
- d. Performance evaluations for Administrative officials reporting to the President, and staff employees who report directly to a Vice President, may be reviewed through a memorandum report rather than the staff evaluation form and rating process designated by Human Resources.

C. Progress Reviews

Supervisors at all levels should hold regularly scheduled conferences with staff members to discuss overall performance and progress toward goals. At least one progress review is recommended during the annual review period. The progress review meeting may be used to assess progress only, or to discuss changes in the performance standards and goals which have occurred during the review period, or to discuss problems in performance; and should be documented using the appropriate form designated by Human Resources.

D. Staff Annual Performance Evaluation

1. Staff performance evaluations will generally be conducted by the staff member's supervisor on an annual basis, and guidelines will be established for each performance evaluation cycle to specify dates and eligibility criteria. The performance evaluation shall include documentation to substantiate the staff member's performance rating.
2. As part of the evaluation procedure, the supervisor will meet with the employee to ensure that the employee understands the performance standards and objectives established, areas of performance success, and the areas needing improvement. The supervisor is responsible for scheduling the meeting and the employee is required to attend. The employee and supervisor will each acknowledge the evaluation form. In addition, the employee will be given the opportunity to provide written comments on the evaluation form.

E. Rebuttals to Performance Evaluation Ratings

1. A staff member may file a rebuttal to the annual performance evaluation or progress review by memorandum within 15 business days from the date the performance rating was shared with them. The rebuttal should be addressed and submitted to the supervisor who completed the performance evaluation. A copy of the rebuttal memorandum will be provided to Human Resources by the supervisor and filed in the staff member's employment file; however, no action will be taken by Human Resources.

2. Any formal grievance, if the employee is eligible, must be filed in accordance with UNT Policy 05.042, Grievance.

F. Performance Evaluation Recordkeeping

The completed Staff Performance Evaluation and any supporting documentation will be maintained in the electronic Performance Management system designated by Human Resources and available for review by the supervisor or employee at any time.

G. Employees Exempted from Staff Performance Evaluations

Administrative officials reporting directly to the President, faculty administrators (including faculty on temporary staff appointments), and contract coaching staff are exempted from review under the Staff Performance Evaluation process. Administrative officials reporting to the President or a Vice -President are not exempted from the program and evaluation process, but may receive a performance evaluation through a memorandum report rather than the rating process. The President may approve an exemption from Staff Performance Evaluations for other classes of employees or for individual positions, as appropriate.

V. References and Cross-References

[UNT Policy 05.042, Grievance](#)

[UNT Policy 16.004, Prohibition of Discrimination, Harassment, and Retaliation](#)

VI. Revision History

Policy Contact:	Asst VC & Chief HR Officer
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