



**1. Policy Statement**

Facilities Planning and Management (FP&M) is committed to supporting all employees to meet their career and professional goals, as well as supporting the university's need to maintain a high-performing workforce.

**2. Purpose**

To define and facilitate a performance management system which supports both informal coaching, feedback and support, as well as annual performance evaluation which documents work performance, goals, and accomplishments related to the duties and expectations of the position.

**3. Definitions**

**4. Scope**

The policy applies to all FP&M employees.

*Excludes:*

- Limited Term Employees
- Student Help

This policy is separate from the probationary review process for new employees.

**5. Procedures**

FPM has developed a performance management program for its employees which includes the following components:

- Expectations and goal-setting.** Managers/supervisors should have initial expectation and goal-setting conversations with each employee who reports directly to them within 30 days of when a new employee begins work, and annually thereafter. These discussions should cover the major duties of each position, work priorities, how successful performance will be evaluated, and developmental needs and strategies to meet these needs. The date of the conversation, and the goals and expectations identified in this meeting, must be documented and the goals/expectations provided to the employee.
- Informal conversations.** Managers/supervisors should conduct regular informal conversations with all employees who report directly to them. These meetings should consist of coaching, feedback, and support to employees about their work, needs, and accomplishments related to the duties and expectations of their positions. Informal conversations do not need to be documented.
- Mid-point conversation.** Approximately midway through each performance year, feedback must be documented and identify whether the employee's performance is meeting expectations.



D. **Summary evaluation.** All managers/supervisors should conduct summary performance evaluation conversations with each employee who reports directly to them at the conclusion of each performance year. This conversation should, at a minimum, include a discussion of the following:

- 1) Whether the employee’s performance met expectations;
- 2) Whether the employee achieved annual goals;
- 3) Professional development needs and opportunities; and
- 4) Options to develop additional skills and knowledge to foster career growth.

**6. Approvals and Revisions**

Approved by Associate Vice Chancellor, William M. Elvey, P.E.

Signature W. M. Elvey Date: \_\_\_\_\_  
8.4.16

Next review date: One year from signing.	
Policy Number	
Effective Date	
Date Approved	
Revision Date	



## Appendix A. Additional Resources

### FPM Performance Evaluation Forms:

- FP&M Performance Review Form [here](http://facilities.fpm.wisc.edu/FPM_Performance%20Review-FINAL_fillable.pdf)  
[http://facilities.fpm.wisc.edu/FPM\\_Performance%20Review-FINAL\\_fillable.pdf](http://facilities.fpm.wisc.edu/FPM_Performance%20Review-FINAL_fillable.pdf)
- FP&M Performance Review Signature Sheet [here](http://facilities.fpm.wisc.edu/FPM_Performance%20Review%20Signature%20Sheet-FINAL_fillable.pdf)  
[http://facilities.fpm.wisc.edu/FPM\\_Performance%20Review%20Signature%20Sheet-FINAL\\_fillable.pdf](http://facilities.fpm.wisc.edu/FPM_Performance%20Review%20Signature%20Sheet-FINAL_fillable.pdf)

### FP&M Training Resources:

- How to Complete the FP&M Performance Review Form [here](http://facilities.fpm.wisc.edu/Packet_How-to-complete-performance-review-form.pdf)  
[http://facilities.fpm.wisc.edu/Packet\\_How-to-complete-performance-review-form.pdf](http://facilities.fpm.wisc.edu/Packet_How-to-complete-performance-review-form.pdf)
- FP&M Performance Management Training for Supervisors Handout [here](http://facilities.fpm.wisc.edu/Packet_PerformanceManagementTraining-Handout.pdf)  
[http://facilities.fpm.wisc.edu/Packet\\_PerformanceManagementTraining-Handout.pdf](http://facilities.fpm.wisc.edu/Packet_PerformanceManagementTraining-Handout.pdf)

### UW-Madison Office of Human Resources documents:

- Performance Management FAQ [here](http://www.ohr.wisc.edu/docs/PerformanceManagementFAQ.pdf)  
<http://www.ohr.wisc.edu/docs/PerformanceManagementFAQ.pdf>
- Performance Management Fact Sheet [here](http://www.ohr.wisc.edu/docs/PerformanceManagementFactSheet.pdf)  
<http://www.ohr.wisc.edu/docs/PerformanceManagementFactSheet.pdf>
- Policy 8.01 Performance Management for Managers and Supervisors [here](https://kb.wisc.edu/ohr/policies/page.php?id=49583)  
<https://kb.wisc.edu/ohr/policies/page.php?id=49583>

## Appendix B. Contacts

Subject	Office or Position	Telephone Number	Office Email or URL
Subject Matter Expert	FPM HR Director	608-262-2953	Sue Fritts Sue.fritts@wisc.edu
Policy Sponsor	Deputy	608-265-3444	Margaret Tennessen Margaret.tennessen@wisc.edu
Web Address: <a href="http://facilities.fpm.wisc.edu/Policies.htm">http://facilities.fpm.wisc.edu/Policies.htm</a>			