

**INDIVIDUAL DEVELOPMENT REVIEW  
FOR  
STAFF EMPLOYEES  
POLICY AND PROCEDURES**

**POLICY**

1. An Individual Development Review will be completed for all employees in order to provide recognition of an individual's accomplishments and to establish goals for the coming year. The employee's Individual Development Review will document the employee's commitment to continuous improvement and institutional effectiveness. The process will also focus on areas of performance and behavior that need improvement. The employee will be expected to self-assess and comment on supervision received.
2. Administrative staff will be reviewed annually according to SACS standard 3.2.10.
3. The Director of Human Resources will periodically update the listing of the University Administrators after consultation with the Vice Presidents and with the approval of the President.
4. The Supervisor will review the performance of new employees upon completion of their evaluative period. Regular status employees will have their performance reviewed annually.

**PROCEDURES**

***I. Types of Reviews***

***A. Evaluative Period Review***

1. During the evaluation (probationary) period all newly hired staff employees are reviewed after completion of 90 days of employment.
2. All staff employees who are promoted into a new position must complete a ninety day evaluation period.
3. The Office of Human Resources will notify the employee's supervisor one month prior to the end date of the employee's evaluation period with instruction to download and complete the Individual Development Review.
4. The completed evaluative review is discussed with the employee and if the employee successfully completes his/her evaluation period, the employee will attain regular employment status.
5. If the supervisor determines that the employee's performance or behavior does not merit regular status the employee will be notified that their employment will end on the date of their meeting. An EPAF is originated to terminate the employee.
6. An employee's evaluation period may be extended for a maximum of 30 days.

***B. Annual Review Period***

1. Annual Reviews are completed on all regular status staff employees. The Individual Development Review period begins on August 1<sup>st</sup>, and ends on April 30<sup>th</sup> of the following year.
2. The Office of Human Resources staff will notify Senior Vice Presidents, Vice Presidents, Associate Vice Presidents, Deans, Associate Deans, Department/Division Chairpersons, and Administrative Staff 30 days prior to the end of the annual review period.

## **II. Annual Individual Development Reviews**

### **A. Administrative Staff Reviews**

- 1. At the beginning of the annual evaluative review period, the administrative staff member will develop outcomes to be achieved during the annual evaluative period.*
- 2. Outcomes are reviewed with the employee's Vice President/Senior Vice President and they will meet to agree on outcomes to be achieved during the review period.*
- 3. Administrative staff are to list conferences, course training, and resources etc. that are required for the employee to achieve their outcomes.*
- 4. At the end of the review period the employee will complete the self-assessment section which will include how the employee achieved their outcomes or the reasons for or not achieving their outcomes.*
- 5. The employee's supervisor will assess how the employee achieved their outcomes.*
- 6. The employee and supervisor will meet to discuss the employee's self-assessment and the supervisor's assessment.*

### **B. Exempt/Managerial and Supervisory Positions**

- 1. The supervisor completes the employee information section of the Individual development review.*
- 2. At the beginning of the review period the employee and their Supervisor will meet to discuss and agree upon goals and outcomes to be achieved during the review period.*
- 3. The employee and their supervisor will sign and date the Individual Development Review Achievement Plan.*
- 4. At the end of the review period, the supervisor will document whether the employee achieved their goals and outcomes and the employee complete a self-assessment.*
- 5. The supervisor rates and comments on the effectiveness of the employee in each of the effectiveness categories. (Refer to the effectiveness definitions found on the Individual Development Review form.)*
- 6. A meeting will be held between the employee and their supervisor to discuss the Individual Development Review.*
- 7. The employee and the supervisor sign the completed Individual Development Review form.*
- 8. If required, the next level of management reviews and signs the completed individual Development Review. The manager at the next level will discuss any concerns he or she has with the results of the review with the employee's supervisor and make recommendations.*
- 9. The completed and approved individual Development Review is placed in the employee's department file, one copy is given to the employee and a third copy is submitted to Human Resources.*

### **C. Exempt/ Non Managerial Review**

- 1. The supervisor completes the Employee Information Section of the Individual Development Review.*

2. *At the beginning of the review period, the employee and their supervisor meet to discuss and agree upon goals and outcomes to be achieved during the evaluation period.*
3. *The employee and their supervisor sign and date the Individual Development Review form at the end of the Achievement Plan section.*
4. *At the end of the review period, the supervisor will write their assessment of how the employee achieved their outcomes.*
5. *The supervisor rates and comments on the effectiveness of the employee in each of the categories. (Refer to the effectiveness definitions.)*
6. *A meeting is held between the employee and their supervisor to discuss the completed Individual Development Review.*
7. *The employee and the supervisor sign the completed Individual Development Review Form.*
8. *If required, the next level of management reviews and signs the completed Individual Development Review form. The manager at the next level will discuss any concerns he or she has with the results of the Individual Review with employee's supervisor and make recommendations.*
9. *The completed and approved Individual Development Review is placed in the employees' department file, one copy is given to the employee and a third copy is submitted to Human Resources.*

**D. Non Exempt / Administrative Support Technical Positions**

1. *The supervisor completes the Employee Information Section of the Individual Development Review.*
2. *If applicable, at the beginning of the review period, the supervisor defines specific actions the employee must take to achieve outcomes, improve performance or behavior during the review period and discuss them with the employee.*
3. *The employee and their supervisor sign and date the Individual Development Review form at the end of the Achievement Plan section.*
4. *At the end of the review period the supervisor will write their assessment of the employee's outcomes and the employee will write their self-assessment.*
5. *The supervisor rates and comments on the effectiveness of the employee in each of the categories. (Refer to the effectiveness definitions.)*
6. *A meeting is held between the employee and their supervisor to discuss their assessments and comments.*
7. *The employee and the supervisor will sign the completed Individual Development Review.*
8. *If required, the next level of management reviews and signs the completed Individual Development Review. The manager at the next level will discuss any concerns he or she has with the results of the review with the employee's supervisor and make recommendations.*
9. *The completed and approved Individual Development Review is place in the employees' department file, one copy is given to the employee and third copy is submitted to Human Resources.*

**E. Non Exempt/ Maintenance, Grounds and Central Plant Positions**

1. *The supervisor completes the Employee Information Section of the Individual Development Review.*

2. *If applicable, at the beginning of the review period, the supervisor defines specific actions the employee must take to achieve outcomes, improve performance or behavior during the review period and discuss them with the employee.*
3. *At the end of the review period the supervisor will write their assessment of the employee's outcomes and the employee will write their self-assessment/comments.*
4. *The supervisor rates and comments on the effectiveness of the employee in each category. (Refer to the effectiveness definitions.)*
5. *A meeting is held between the employee and their supervisor to discuss their assessments and comments.*
6. *The employee and the supervisor sign the completed Individual Development Review form.*
7. *If required, the next level of management reviews and signs the completed Individual Development Review. The manager at the next level will discuss any concerns he or she has with the results of the review with the employee's supervisor and make recommendations.*
8. *The completed and approved Individual Development Review is place in the employees' department file, one copy is given to the employee and third copy is submitted to Human Resources.*

**F. Non Exempt/ University Police Positions**

1. *The supervisor completes the Employee Information Section of the Individual Development Review.*
2. *If applicable, at the beginning of the review period, the supervisor defines specific actions the employee must take to achieve outcomes, improve performance or behavior during the review period and discuss them with the employee.*
3. *The employee and their supervisor sign and date the Individual Development Review form.*
4. *At the end of the review period the supervisor will write their assessment of the employee's outcomes and the employee will write their self-assessment.*
5. *The supervisor rates and comments on the effectiveness of the employee in each category. (Refer to the effectiveness definitions.)*
6. *A meeting is held between the employee and their supervisor to discuss their assessments and comments.*
7. *The employee and the supervisor sign the completed Individual Development Review form.*
8. *If required, the next level of management reviews and signs the completed Individual Development Review. The manager at the next level will discuss any concerns he or she has with the results of the review with the employee's supervisor and make recommendations.*
9. *The completed and approved Individual Development Review is place in the employees' department file, one copy is given to the employee and third copy is submitted to Human Resources.*