



# Employee Performance Management and Development System Policy

Policy Number: PP 4-3

Effective Date: September 1, 2013

Approved By: Roger L. Stancil, Town Manager

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## POLICY

The Town of Chapel Hill values providing excellent service to all who live, work, and visit Chapel Hill. The Town recognizes that excellent service emanates from excellent employees. The Employee Performance Management and Development System (EPMDS) is a continuous communication strategy that assists our workforce in achieving desired behaviors and results through the execution of clearly defined performance expectations, two-way communication between the employee and their supervisor, and ongoing professional development opportunities.

## PURPOSE

In accordance with the Town values of Responsibility and Communication, the purpose of the Employee Performance Management and Development System (EPMDS) is to provide a communication strategy between employees and managers that supports on-going feedback and two-way communication about job performance, with the goal of helping employees to perform at the highest standards and understand how his/her job helps fulfill the Town's vision and mission.

## R.E.S.P.E.C.T. VALUES



**Responsibility:** We acknowledge that our duties impact the jobs of many other employees. We take ownership over our roles within the organization as a way to demonstrate our consideration for the time and efforts of our fellow employees as well as pride in our own work.



**Communication:** We take part in constructive dialogues and set clear goals and expectations so we may better understand our roles in the workplace. Our organizational values serve as a common language when discussing each other's decisions and actions.

## APPROVAL

Roger L. Stancil, Town Manager



# Employee Performance Management and Development System Procedures

Policy Number: PP 4-3

Effective Date: July 1, 2017

Approved By: Cliff Turner, Human Resources Director

## PROCEDURES

### A. Performance Management Components: EPMDS consists of five basic components:

1. Planning and Preparation: Each supervisor along with department management will plan and prepare for the work that is to be accomplished at the beginning of each annual performance cycle and will be based on the job responsibilities.
2. Communicating Performance Expectations with Employees: At the beginning of the review cycle, supervisors will meet with their employees to establish the standards regarding their performance and help them understand how the standards will contribute to the achievement of the Town and their department's mission and goals.
3. Coaching and Ongoing Feedback: The performance management process depends upon an on-going two-way communication between supervisors and employees.
4. Mid-Cycle and Annual Performance Evaluations: At the mid-cycle of the review period, supervisors shall provide an interim evaluation of the employees' performance during the past 6-month period compared to their performance expectations. This process will be repeated at the end of the review period for the employees' performance during the past 12-month period.
5. Employee Training and Development Planning: All employees are expected to be continually learning and developing skills every year. Supervisors are expected to collaborate with their employees to establish training and development plans for their employees annually.

### B. EPMDS Annual Timeline:

1. Annual Performance Cycle: The Town's annual review cycle is September 1 – August 31, with a mid-cycle review date of February 28 and an annual evaluation due date of November 1. The Town Manager may modify the Performance cycle timelines in accordance with the Town's business needs.
2. Setting Performance Expectations: Performance expectations should be established and discussed with each employee within **thirty (30)** calendar days of the beginning of each performance review cycle.
3. Mid-Cycle Reviews: All regular employees will receive a mid-cycle performance evaluation approximately six (6) months after the beginning of the annual performance cycle.

4. Annual Review: All employees will receive a performance evaluation, on or before, the annual review date, unless they are on probation, not actively at work, or have received a performance evaluation within the preceding ninety (90) calendar days.

5. Timeline Modifications: The Town Manager may modify the Performance cycle timelines in accordance with the Town's policies and procedures.

**C. Probationary Employees Timeline:** New employees and individuals promoted to a new position will be on probation for a period not to exceed six (6) months, except for public safety and department head positions, which have a twelve (12) month probationary period.

1. Probationary Performance Expectations: Probationary employees must be informed of performance standards within thirty (30) calendar days of employment or promotion to a new position.

2. Probationary Mid-Cycle Reviews: Probationary employees must receive a mid-cycle performance evaluation at three (3) months after employment or promotion to a new position, or six (6) months for public safety and department head positions.

3. Probationary Formal Performance Evaluation: Probationary employees must receive a formal performance evaluation, using the EPMD Employee Evaluation Form, fifteen (15) calendar days prior to the conclusion of their probationary period. If an employee completes his/her probationary period and receives a formal performance evaluation within ninety (90) days calendar days of the common annual review date, the employee will not receive another performance evaluation on the common annual review date. (The employee will receive a mid-cycle performance evaluation approximately six months following the common annual review date, on or about February 28 of the following year.)

4. Annual Reviews: Following the completion of a probationary period, employees will receive subsequent performance evaluations on the common review date.

#### **D. Performance Ratings**

1. Acceptable Performance: This rating will be used both for those employees that are meeting the expectations of the job, as well as those employees that are clearly exceeding those expectations.

2. Below Acceptable Performance: When employees are unable to perform at an acceptable level for the job, they will receive a "Below Acceptable Performance" rating.

3. Performance Improvement Plan: When an employee receives a "Below Acceptable Performance" rating, the department will work with Human Resource Development to provide the employee a customized Performance Improvement Plan (PIP). An employee who fails to meet the performance requirements outlined in the PIP will be subject to disciplinary action, up to and including termination.

PROCEDURES  
CONT.

**E. Coordination with Discipline Process:** An overall performance rating of “Below Acceptable Performance” will be addressed in accordance with the Town’s disciplinary policies and procedures.

**F. Request for Reconsideration and Coordination with Grievance Process:** When an employee does not agree with an aspect of their Performance Evaluation and wants to have it reconsidered, they may complete a Request for Reconsideration form and ask for their supervisor to reconsider their Performance Evaluation.

- a) Employees must complete the Employee Section of the Request for Reconsideration form within (7) calendar days from the date of the performance evaluation meeting.
- b) If the employee’s immediate supervisor does not decide to reconsider their evaluation, they will record their justification to support their decision on the Request for Reconsideration form.
- c) The meeting between the employee and the supervisor to discuss the Request for Reconsideration will constitute a Step 1 Grievance in accordance with the Town's grievance procedures.
- d) If the employee is not satisfied with the supervisor's response, the employee may grieve the supervisor's response in accordance with the Town’s grievance procedures.

**G. Leaves of Absence:** Employees who are not actively at work when the mid-cycle or the annual performance evaluations are due because of an approved leave of absence or medical leave will receive a performance evaluation when they return to work and in accordance with any applicable laws and regulations.

**H. Changes in Supervision:** When changes in Supervision occur during an evaluation cycle, supervisors should consult with HRD to ensure that employees are evaluated in accordance with the performance management system guidelines.

**I. Unusual Circumstances:** There may be circumstances that are unexpected or not covered by the standard policies. When unusual circumstances arise, such as an employee fulfilling a military commitment, the Human Resources Development Department should be contacted to assist in developing a plan to deal with the circumstances of the situation and ensure compliance with applicable laws.

FORMS/INSTRUCTIONS

- A. Employee Evaluation**
- B. Supervisor Performance Log**
- C. Employee Performance Improvement Plan: Regular and Probationary**
- D. Employee Self-Evaluation**
- E. Employee Feedback**
- F. Employee Evaluation Request for Reconsideration**
- G. Employee Performance Management and Development System Manual**

ADDITIONAL  
CONTACTS

Human Resource Development (919) 968-2700

PROCEDURES  
APPROVED BY

Cliff Turner, Human Resources Development Director



SCOPE

As of September 1, 2013 this policy replaces and supersedes any previous policies, sections of the employee handbook, or unwritten policies or practices covering the same subject.

RELATED  
INFORMATION

- Town of Chapel Hill EPMDS Supervisor Training Guide
- Town of Chapel Hill Employee Performance Management and Development Guide

RESPONSIBILITIES

Each person or group identified below has a very important role to play in the Performance Management and Development System to insure the overall success. Because this system has a significant interdependence component, the effectiveness of each person in performing all the aspects of his/her role may substantially affect the overall effectiveness of the system for the Town.

- Town Manager
- Department Heads
- Supervisors
- Lead Workers
- All Employees
- Human Resources Department

DEFINITIONS

- A. Performance evaluation:** a document that includes the employee's performance expectations, a summary of the employee's actual performance relative to those expectations, an overall rating of the employee's performance, and the supervisor's and employee's signatures.
- B. Fair ratings:** Evaluating employees in a manner that accurately reflects how they performed relative to the expectations defined in the beginning of the review period and in a manner that is not influenced by factors irrelevant to performance.

POLICY  
HISTORY

None.