Motion Regarding HR Design Language for Performance Management
Submitted by Academic Staff Executive Committee (ASEC)

Motion (For Vote)
Be it resolved that the UW-Madison Academic Staff Assembly supports use of the language below by the Academic Personnel Office in the new HR Design documents.

Proposed Language
The draft language below is included in a draft policy on Performance Management (changes in red and strikeouts are changes from Document #522). Because it could violate the spirit of the motion that was passed in 2012, ASEC moved to bring this language to the Assembly. The current proposed language reads:

- **At a minimum, each program must needs to include the following:**
  - **1. Expectations and goal-setting.** ...
  - **2. Informal conversations.** ... Informal conversations do not need to be documented.
  - **3. Summary evaluation.** ... This conversation should, at a minimum, include a discussion of the following:
    a. Whether the employee’s performance met expectations
    b. Whether the employee achieved annual goals
    c. Professional development needs and opportunities
    d. Options to develop additional skills and knowledge to foster career growth.

The expectations, goal-setting, and summary conversation must be documented. However, there is no prescribed format for this documentation. The documentation can range from a simple checklist signed by the supervisor and employee that ensures the discussion covers all of the necessary elements of a performance evaluation to a comprehensive written evaluation.

Background
On November 12, 2012, the Academic Staff Assembly (Document # 490) passed the amendment below striking most of this text from the “Strategic Plan for a New UW-Madison Human Resource Center” (HR Design):

- Strike all text after cycle. Please note the text that was stricken is underlined below.

  The university will require that all units implement a standard performance management cycle that includes the following as a minimum standard:
  - Setting goals that incorporate both work and employee development goals
  - Conducting a mid-year check-in with each employee
  - Providing a year-end written evaluation that assesses employee progress against agreed-upon goals and identifies developmental needs and opportunities

These changes were incorporated in the plan, and the revised plan was submitted to the Board of Regents.