90 Day Evaluation Period Process: Guidelines for Supervisors

Before Staff Member is Transferred to New Position
- Reference the 90 Day Evaluation Period for internal transfers in the offer letter. See template letter at https://www.hr.upenn.edu/myhr/resources/forms/recruitment.
- Begin drafting the performance goals/expectations for the 90 Day Evaluation Period and identify competencies needed in this position.

Upon Transfer/Within the First Week in the New Position
- Give the staff member a copy of the position description.
- Establish written performance expectations and goals using the Online Performance Appraisal System. You can also identify competencies for the staff member to work on in the 90 Day Evaluation Period. Identifying competencies is optional but is encouraged to support the professional development of the staff member.
- Meet with the transferred staff member to discuss the job responsibilities, performance goals/expectations, relevant departmental policies, practices and procedures. Use the Online Performance Appraisal System to complete and deliver to the staff member the performance goals and competencies, if any, for the 90 Day Evaluation Period.
- Ensure that the transferred staff member receives the appropriate orientation to the school/center and department.

Throughout the 90 Day Evaluation Period
- Meet regularly with the staff member to give feedback on performance and the staff member’s progress at meeting expectations. Also, give feedback to the staff member regarding how s/he is demonstrating the competencies identified, if applicable. Document these discussions.
- Provide staff member with appropriate training, resources and guidance.
- Remember to regularly recognize the staff member’s achievements.
- Consult early with Staff and Labor Relations or your school/center human resources professional if the staff member is not meeting performance goals/expectations during the 90 Day Evaluation Period.

Prior to the End of the 90 Day Evaluation Period
- Based on an overall assessment of the staff member’s performance during the 90 Day Evaluation Period decide whether the staff member is meeting the performance goals/expectations during the period. If the staff member is not meeting the performance goals/expectations, decide whether you want to place the staff member on probation or some other level of discipline in accordance with the Performance Improvement/Discipline Policy https://www.hr.upenn.edu/myhr/resources/policy/performance/performance-improvement-discipline.)
- Consult with Staff and Labor Relations or your school/center human resources professional before completing and presenting the 90 Day Evaluation Review if you plan to place the staff member on probation or another step in the disciplinary process. This consultation should take place as early as possible.
- Complete the 90 Day Evaluation Review using the Online Performance Appraisal System. The review should be presented to the staff member on or before the end of the 90 Day Evaluation Period.
Following the 90 Day Evaluation Period

- Continue to meet regularly with the staff member to give feedback on performance and the staff member’s progress at meeting expectations and goals. Also, give feedback to the staff member regarding how s/he is demonstrating the competencies identified, if applicable. Document these discussions.
- Update performance expectations and goals as needed and share revisions with the staff member.
- Continue to provide the staff member with the appropriate training, resources and guidance.
- Discuss professional development plans and opportunities with the staff member.
- Remember to regularly recognize the staff member’s achievements.
- Address performance issues in a timely manner. You should consult with Staff and Labor Relations or your school/center human resources professional for assistance. If the staff member was placed on probation or another step in the disciplinary process, you need to regularly consult with Staff Relations or your school/center human resources professional on the staff member’s performance. Before the end of the probation period you need to decide, in consultation with Staff and Labor Relations or your school/center human resources professional, what action to take on the staff member’s employment. This decision must be communicated to the staff member in writing after this consultation and before the end of the established probation period.