Introductory Period Review Process: Guidelines for Supervisors

Before the Staff Member’s Arrival

- Determine the appropriate introductory period for the position prior to making a job offer. If for business and operational needs, the introductory period should be longer than the normal first four (4) months of employment, consult with Staff and Labor Relations (215-898-6093) or your school/center human resources professional before finalizing the length of the introductory period.
- Outline the timeframe of the Introductory Period 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 Introductory Period and identify competencies needed in this position.

Upon hire/Within the First Week of Employment

- 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 Introductory Period. Identifying competencies is optional but is encouraged to support the professional development of the staff member.
- Meet with the new 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 Introductory Period.
- Ensure that the new staff member receives the appropriate orientation to the University, school/center and department. Refer the staff member to the New Faculty and Staff Portal for valuable information (https://www.hr.upenn.edu/myhr/new-staff-member-portal)

Throughout the Introductory 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 Introductory Period.

Prior to the End of the Introductory Period

- Based on an overall assessment of the staff member’s performance during the introductory period decide whether you want to continue the staff member’s employment, extend the introductory period, if applicable, or terminate the staff member’s employment.
- Consult with Staff and Labor Relations or your school/center human resources professional before completing and presenting the Introductory Review if you plan to extend the introductory period or terminate the staff member. This consultation should take place as early as possible.
- Complete the Introductory Review using the Online Performance Appraisal System. The review should be presented to the staff member on or before the end of the Introductory Period.
Following the Introductory 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.
- Address performance issues in a timely manner. You should consult with Staff and Labor Relations or your school/center human resources professional for assistance.
- 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.