

## **SERENITY BEHAVIORAL HEALTH SYSTEMS**

<b>SUBJECT:</b>	<b>PERFORMANCE MANAGEMENT</b>
<b>POLICY NUMBER:</b>	<b>HR-10.01</b>
<b>EFFECTIVE DATE:</b>	<b>September 1997</b>
<b>SUPERSEDES:</b>	<b>N/A</b>
<b>LAST REVISION DATE:</b>	<b>July 2010</b>

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### **POLICY:**

It is the policy of Serenity Behavioral Health Systems (SBHS) to have a Performance Management Program that provides supervisors and employees with the opportunity to discuss performance expectations, identify and correct areas for improvement, encourage and recognize strengths, and discuss positive, purposeful approaches for meeting goals. Performance discussions should occur at a minimum of three times per year at each of the following stages: Performance Planning, Mid-year Review, and end of year Performance Evaluation.

### **TERMS AND DEFINITIONS:**

- I. “Performance Expectations” means competencies, goals, and responsibilities that drive individual performance.
- II. “Competencies” means observable and measurable behaviors, knowledge, skills, abilities, and other characteristics that contribute to individual success in the job at SBHS.
- III. “Goal” means a measurable outcome or result that needs to be achieved. Goals should include the result of the behavior being measured, the measurement criteria, and the level of performance expected.
- IV. “Individual Development Plan” means an action plan that identifies goals, projects, and activities which contribute to the employee’s continual development at SBHS.

### **EVALUATION PERIOD:**

- I. The performance evaluation period begins on July 1 and ends on June 30 of the following year. Employees newly hired at SBHS from July 1 through September 30 are not eligible to receive salary increases on the authorized date.
- II. Employees newly hired at SBHS during the performance evaluation period are to be evaluated from the date of hire through June 30.
- III. Performance-based salary increases are effective on an authorized date determined by the Governor of Georgia.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 2 of 15**

- IV. Each year a deadline to change summary ratings will be set by Human Resources. After this deadline, no changes can be made to any summary rating unless such changes are in accordance with the Request for Review on page 4.

**PERFORMANCE MANAGEMENT PROCESS:**

Supervisors are required to seek input from affected employees when performance standards and/or expectations are established or modified. The Program Managers have sole discretion to make the final determination of individual goals, competencies, or responsibilities included in the performance document as well as final determination of the employees' rating.

- I. The performance management process requires a sequence of actions that supervisors take when interacting with employees about their performance. The process involves three components: Performance Planning, Coaching and Development, Performance Evaluation.
- II. At the conclusion of each performance period, the performance of each employee shall be documented, evaluated and rated. A summary rating, reflective of the overall level of performance, shall be assigned to each evaluation according to the State Personnel Board's implementation policy.

**NOTE:** Employees on hourly positions, re-employed retired employees or temporary employees on positions are not eligible for benefits are not required to have PMF plans and are not eligible for performance based salary increases.

- III. A limited number (generally three or less) of the responsibilities on the PMF plan may be designated as "critical." Only responsibilities that are essential for success in a position should be marked "critical." Employees who are unsatisfactory performers (Rating of 1) in any critical responsibility area most likely will receive an overall rating of Did Not Meet Expectations.
- IV. Evaluating supervisors must discuss proposed PMF plans with reviewing managers and receive approval before meeting with employees or providing copies of the plans to employees. Supervisors who do not comply with the above are subject to disciplinary action.
- V. Reviewing managers are to assume responsibility for developing PMF plans if:
- A. Evaluating supervisors are absent for an extended period of time
  - B. Evaluating supervisor positions are vacant
  - C. New supervisors have not been trained in the performance management process

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 3 of 15**

**JOB DESCRIPTIONS:**

A job consists of duties and responsibilities and therefore may be comprised of one or more positions. In contrast, a position refers to a set of duties and responsibilities assigned or delegated for performance by one person.

Job descriptions generally illustrate the type of work performed by incumbents and specify the qualifications necessary to do that work. The language of a job description should not be construed as limiting or modifying the authority that SBHS has or may be given to modify the duties and responsibilities of employees, or to direct and control their work. Each position should be allocated to the job title that best describes the position's type and level of responsibilities.

**PMF PLAN MEETING:**

- I. Evaluating supervisors (or reviewing manager, if necessary as indicated above) are to meet and present individual PMF plans for the upcoming performance evaluation period to every eligible employee.
  - A. Plans are to be presented to employees:
    1. At the time of hire
    2. At the beginning of the performance evaluation period or
    3. Placement of employees in new/different positions (e.g., appointments, transfers, promotions, demotions) so they are aware of their job duties.
- II. If evaluating supervisors are unable to meet with employees during this time frame due to unusual or extenuating circumstances on the part of employees (e.g., employees are absent for an extended period of time), the circumstances must be explained on the PMF plans. The plans are to be presented and discussed with the employees upon their return to duty.
- III. If evaluating supervisors are unable to meet with employees due to their own absence for an extended period of time, reviewing managers are to hold PMF plan meetings.
- IV. Evaluating supervisors and employees are to meet to discuss the responsibilities and expectations of employees' positions and the terms and conditions of employment.
- V. Efforts are to be made to resolve disagreements between employees and evaluating supervisors on responsibilities and expectations on PMF plans.
- VI. Employees may be given a specified period of time, not to exceed five (5) workdays, to review their PMF plans before signing. At or before the end of the specified review period, the PMF plans must be returned to evaluating supervisors for processing.
- VII. If employees do not sign PMF plans, evaluating supervisors are to note on the plans that they were presented and that the employees chose not to sign.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 4 of 15**

- VIII. Employees' signatures on PMF plans do not waive the right of employees to request reviews.
- IX. Evaluating supervisors are to provide employees with copies of the completed PMF plans after signatures of employees (if signed); evaluating supervisors and reviewing managers have been added.
- X. If responsibilities and expectations change during a performance evaluation period, changes are to be discussed with employees and modifications made to PMF plans.
  - A. Minor modifications to PMF plans may be made without prior review and approval from reviewing managers
  - B. Significant modifications to PMF plans should be reviewed and approved by reviewing managers prior to implementing new responsibilities or expectations
  - C. Employees must be provided copies of modified PMF plans and offered the opportunity to sign.
  - D. The performance management program requires that employees actively participate in the performance evaluation process and work with their manager/supervisor to develop performance plans.
- XI. The performance management program requires that supervisors develop the performance management plan with employees being placed in a new position, coach the employee and monitor the employee's job performance, conduct a fair, unbiased, and equitable performance evaluation annually for each employee.
- XII. A performance plan may be modified at any time during a performance period and shall be modified when new or different responsibilities and/or expectations are added to a position.

**REQUEST FOR REVIEW:**

- I. Employees may request a review of their PMF Plans.
  - A. If employees express the belief that their PMF plans are arbitrary, capricious, non job-related, or unrealistic, and efforts to resolve the differences are not successful, evaluating supervisors must inform employees of their right to request a review.
  - B. This written notice is to be provided to employees within two (2) workdays of being advised of the employees' intent to request a review. The name and address of the appropriate reviewing official is to be provided to employees.
  - C. SBHS Reviewing Officials are designated by the Chief Executive Officer (CEO) and shall not be the first level supervisor of the employee requesting review. The identity of the designated official shall be provided to each employee upon presentation of a performance plan or a summary rating of unsatisfactory performance. It is the role of the reviewing official to review each request and supporting documentation and

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 5 of 15**

- render a decision to either uphold or direct the responsible supervisor to revise the assignment or rating.
- II. Evaluating supervisors should verify the name of the appropriate designated reviewing official prior to providing this information to employees.
    - A. The SBHS CEO is responsible for designating reviewing officials for SBHS.
    - B. Reviewing managers cannot be the first or second level supervisors of employees requesting reviews or involved with developing the employees' PMF plan.
  - III. A written request for review must be submitted to the designated reviewing official within five (5) workdays of receiving completed PMF plans.

**REVIEW OF PMF PLAN:**

- I. Reviewing managers are to review PMF plans and information provided by employees and evaluating supervisors. Discussions should be held with employees and evaluating supervisors regarding the request for review.
- II. Reviewing Managers will determine if PMF plans are arbitrary, capricious, non job-related or unrealistic and issue findings that either uphold PMF plans as written or determine that changes are to be made.
- III. Reviewing Managers are to issue their findings in writing to the employees, evaluating supervisors and reviewing managers within fifteen (15) workdays of receiving employees' request for review.
- IV. If changes are to be made to PMF plans, determinations will be made on a case by case basis regarding the appropriate official to make the changes (i.e., the evaluating supervisor, reviewing manager or designated reviewing official) and the appropriate official(s) to sign modified PMF plans.
- V. If changes are made to PMF plans, employees are to be given an opportunity to review and sign the modified PMF plans. If employees do not sign modified PMF plans, evaluating supervisors are to note on the modified plans that they were presented and that the employees chose not to sign.
- VI. Evaluating supervisors are to provide employees with copies of completed modified PMF plans after signatures of employees (if signed) and the appropriate official(s) have been added.
- VII. Decisions made by designated reviewing managers are final. Issues concerning the performance management process are not grievable or appealable to the State Personnel Board.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 6 of 15**

**PMF PLAN NOT RECEIVED:**

- I. If PMF plans are not provided to employees at the beginning of a new performance evaluation period or placement in new/different positions, employees may file a complaint with the Human Resources Department to discuss concerns.
- II. The Human Resources Department will take appropriate steps to ensure that employees receive individual PMF plans within fifteen (15) calendar days of notification. Evaluating supervisors and reviewing managers are subject to disciplinary action, up to and including separation, if PMF plans are not prepared and presented to employees in a timely manner.

**INTERIM REVIEWS:**

- I. Evaluating supervisors should meet with each employee on an on-going basis to give performance feedback throughout the evaluation period.
- II. Evaluating supervisors must meet with each employee at least once during the performance evaluation period to conduct interim reviews of employees' work performance and adherence to terms and conditions of employment.
- III. Evaluating supervisors may use any of the following methods to document interim reviews:
  - A. The Performance Management Form (PMF) must be completed
  - B. The Management Review Form MS 10-61 (MRF) may be completed
  - C. Notations of meetings may be made in supervisory files
  - D. Other methods of documenting reviews may be used

**COMPLETING PMF PROCESS:**

- I. PMF's must be completed using employee's individual PMF plans to evaluate employees who are eligible to be considered for performance based salary increases. (See exception in IV below)
  - A. Evaluating supervisors should begin preparing PMF evaluations in early July in order to allow sufficient time for completion, review and processing.
  - B. Evaluating supervisors will be advised of time frames for processing completed PMF evaluations each year.
- II. Employees may submit a brief summary of major accomplishments achieved during the performance evaluation period to their evaluating supervisors.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 7 of 15**

- III. Evaluating supervisors should closely review performance and adherence to terms and conditions of employment to determine if performance based salary increases is appropriate. Specific attention should be given when evaluating employees who have not been present at work for at least 90 days for the following reasons:
  - A. Employees are new on the job or
  - B. Employees have been or are currently absent from work for an extended period of time during the evaluation period.
- IV. Eligible employees hired between April 1 and June 30 of the current evaluation period should be evaluated using the PMF if evaluating supervisors have had sufficient time to adequately evaluate performance. At a minimum, evaluating supervisors must submit to reviewing managers written recommendations to either grant or deny performance based salary increases for employees hired between April 1 and June 30. Performance based salary increases that are granted based on written recommendations without a completed PMF evaluation are at the Met Expectations level.
- V. SBHS evaluating supervisors are required to complete PMF evaluations for employees who are promoted, demoted or transferred to other positions within SBHS. This includes 'close out' evaluations when employees leave during the evaluation period, as well as performance evaluations ending June 30.
  - A. If the employee leaves the position before the evaluating supervisor is able to complete the evaluation and review it with the employee, then a comment is to be added to show that the evaluation was completed but was not discussed with the employee.
  - B. The evaluation is to be forwarded to the Human Resources Department for placement in the employee's official SBHS personnel file. A copy is to be provided to the new evaluating supervisor, if known.
- VI. Employees, who are promoted, demoted or transferred after the performance evaluation period ends on June 30 must be evaluated by the supervisors who supervised them at the end of the evaluation period ending June 30.
  - A. SBHS officials who hire employees between the periods of July 1 – September 30 are to request completed PMF evaluations from previous supervisors.
  - B. The performance ratings determined by these supervisors are to be reported to Human Resources.
  - C. Any difficulty in receiving performance evaluations and ratings should be reported to Human Resources.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 8 of 15**

- VII. When employees have been promoted, demoted or transferred to new positions during a performance evaluation period, evaluating supervisors as of June 30 are to complete PMF evaluations and make the salary increase eligibility determinations. Evaluating supervisors may take into consideration any PMF completed during the performance evaluation period by previous evaluating supervisors.
- VIII. The entire review period should be evaluated. Consideration should be given to rating(s) from previous position(s), but the weight to be accorded to any previous ratings rests with the evaluating supervisor.
- IX. Evaluating supervisors are to rate employees' performance on responsibilities to the following scale:
  - A. (0) New Hire or Transfer within 5 months of performance review
  - B. (1) Unsatisfactory Performer
  - C. (2) Successful Performer Minus
  - D. (3) Successful Performer
  - E. (4) Successful Performer Plus
  - F. (5) Exceptional Performer
- X. Extraordinary circumstances beyond an employee's control should be closely reviewed prior to recording a rating of unsuccessful performer for any "critical" responsibility.
- XI. Evaluating supervisors are to rate employees' adherence to terms and conditions of employment according to the following scale:
  - A. (0) New Hire or Transfer within 5 months of performance review
  - B. (1) Unsatisfactory Performer
  - C. (2) Successful Performer Minus
  - D. (3) Successful Performer
  - E. (4) Successful Performer Plus
  - F. (5) Exceptional Performer
- XII. Appropriate corrective action must be taken against employees who do not meet expectations or need improvement.
  - A. Appropriate action includes, but is not limited to, adverse action, other disciplinary action, placement on a Work Plan or placement on an Attendance Plan.
  - B. Evaluating supervisors or Program Managers should contact Human Resources for assistance in this area.
- XIII. Evaluating supervisors should provide comments on actual performance for each Responsibility area and Terms and Conditions of Employment area. Specific comments which support ratings of unsatisfactory performer or exceptional performer are required.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 9 of 15**

- XIV. Evaluating supervisors must discuss proposed PMF evaluations with reviewing managers and receive approval before meeting with employees or providing copies of evaluations to employees. Supervisors who do not comply with the above are subject to disciplinary action.
- XV. Reviewing managers are to assume the responsibility of completing PMF evaluations if:
- A. Evaluating supervisors are absent for an extended period of time
  - B. Evaluating supervisor positions are vacant
  - C. New supervisors have not been trained in the performance management process or
  - D. New supervisors have not had sufficient time to evaluate employees' performance and adherence to the terms and conditions of employment
- XVI. Reviewing managers are responsible for reviewing PMF evaluations prepared by evaluating supervisors to ensure consistency, accuracy and timeliness.
- XVII. Reviewing managers have the authority to change the ratings proposed by evaluating supervisors if the managers disagree with the ratings and are able to articulate a reasonable basis for the disagreement.
- A. This should be considered a 'last resort' as the expectation is that in most instances in which there is an initial disagreement, the reviewing manager and evaluating supervisor will engage in discussions sufficient to resolve the disagreement and reach consensus.
  - B. If the disagreement cannot be resolved, the reviewing manager will make the rating and comment changes. A comment should be entered on the PMF evaluation that it was completed by the reviewing manager. The reviewing manager will present the evaluation to the employee, sign the PMF as both evaluating supervisor and reviewing manager and complete the process. The original evaluating supervisor will not be required to meet with the employee or sign the PMF, but will be required to accept the reviewing manager's decision as the final SBHS action.
- XVIII. SBHS individual programs should each have a process in place to review PMF evaluations to ensure consistency, accuracy and timeliness throughout each program.

**PMF EVALUATION MEETING:**

- I. Evaluating supervisors are to meet with employees to discuss their completed PMF evaluations.
- A. If evaluating supervisors are unable to meet with employees due to unusual or extenuating circumstances on the part of employees, (e.g., employees are absent for

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 10 of 15**

- an extended period of time) the circumstances must be explained on their PMF's. The PMF evaluations are to be presented to the employees upon their return to duty.
- B. If evaluating supervisors are unable to meet with employees due to their own absence for an extended period of time, the reviewing managers are to hold the PMF evaluation meetings.
- II. Evaluating supervisors are to advise employees that they may add comments on the PMF evaluation. Employees may be given a specified period of time, not to exceed five (5) work days, to review their PMF evaluations and add comments. At or before the end of the specified review period, PMF evaluations must be returned to evaluating supervisors for processing.
- III. If employees do not sign their PMF evaluations, evaluating supervisors are to note on the evaluations that they were discussed with the employees and that the employees chose not to sign.
- IV. Employees' signatures on PMF evaluations indicate that the PMF ratings and salary increase eligibility were discussed. Employees' signatures do not necessarily indicate agreement with the PMF evaluations and do not waive the right of employees to request a review of an overall summary rating of unsatisfactory performer for either Responsibilities or Terms and Conditions of Employment.
- V. Performance evaluations must be dated and acknowledged by the employee and supervisor. No changes can be made or comments added to the performance evaluation without the employee's knowledge.
- VI. Evaluating supervisors are to provide employees with copies of their completed PMF evaluations after signatures of employees (if signed); evaluating supervisors and reviewing manager have been added. At that time, the name, title, address and telephone number of the appropriate designated reviewing official are also to be provided in writing to employees who receive an overall summary rating of unsatisfactory performer for either Responsibilities or Terms and Conditions of Employment.
- VII. Evaluating supervisors should verify the name of the appropriate designated reviewing official prior to providing this information to employees.
- A. SBHS is responsible for designating reviewing officials for their programs.
- B. Designated reviewing officials cannot be the first or second level supervisors of employees requesting reviews or involved with completing the PMF evaluation.
- VIII. Original PMF evaluations are to be forwarded to Human Resources for placement in official personnel files.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 11 of 15**

**REQUEST FOR REVIEW:**

- I. Evaluating supervisors are to advise employees who receive an overall rating of unsatisfactory performer for either Responsibilities or Terms and Conditions of Employment that they may request a review if they believe the rating is arbitrary, capricious, or not reflective of their actual performance or adherence to terms and conditions of employment.
- II. Request for review must be submitted in writing to the specific designated reviewing official within five (5) workdays of employees receiving their completed PMF evaluations.
- III. Employees who receive at least an overall rating of successful performer minus or higher for Responsibilities and an overall rating of Successful performer minus or higher for Terms and Conditions of Employment cannot request a review of their PMF evaluations.

**REVIEW OF EVALUATION:**

- I. Reviewing managers are to review PMF evaluations and supporting documentation provided by employees and evaluating supervisors. Discussions should be held with employees and evaluating supervisors regarding the request for review.
- II. Reviewing managers will determine if PMF evaluations are arbitrary, capricious, or not reflective of actual performance or adherence to terms and conditions of employment and issue findings that either uphold PMF evaluations as written or determine that changes are to be made.
- III. Reviewing managers are to issue their findings in writing to the employees and evaluating supervisors within fifteen (15) work days of receiving employees' request for review.
- IV. If changes are to be made to PMF evaluations, determinations will be made on a case by case basis regarding the appropriate official to make the changes (i.e., the evaluating supervisor or reviewing manager) and the appropriate official(s) to sign modified PMF evaluations.
- V. If changes are made to PMF evaluations, employees are to be given an opportunity to review and sign the modified PMF evaluations. If employees do not sign their modified PMF evaluations, evaluating supervisors are to note on the evaluations that they were discussed with the employees and that the employees chose not to sign.
- VI. Evaluating supervisors are to provide employees with copies of their completed modified PMF evaluations after signature of employees (if signed) and the appropriate official(s) have been added.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 12 of 15**

- VII. The original copies of modified PMF evaluations are to be forwarded to Human Resources for placement in official personnel files. Any previous PMF evaluation that has been forwarded to Human Resources must be retrieved and destroyed by the evaluating supervisor.
- VIII. Decisions made by designated reviewing officials are final. Issues concerning the performance management process are not grievable or appealable to the State Personnel Board.

**PMF EVALUATION NOT RECEIVED:**

- I. Employees who have not received their PMF evaluations by September 15 in a calendar year should contact their evaluating supervisors to discuss the status of the evaluations.
- II. If no resolution is reached after five (5) calendar days, employees should contact Human Resources.
- III. It is the responsibility of the Human Resources Department to administer the Performance Management program within SBHS. The CEO shall designate an official(s) to consider employee requests for review of assigned responsibilities and/or expectations or summary ratings.

**FAILURE TO COMPLY WITH POLICY:**

Evaluating supervisors and reviewing managers who fail to carry out the responsibilities outlined in this policy and/or who do not meet the required performance management deadlines will be subject to disciplinary action, up to and including separation. In addition, evaluating supervisors and reviewing managers who do not comply with the provisions of this policy without justification will receive a rating of unsatisfactory performer for the “critical” performance management responsibility on their PMF. Managers are responsible for ensuring that the provisions of this policy are met.

**REWARDING PERFORMANCE:**

Performance rewards are based on employee rating and availability of funds as appropriated on an annual basis and provided for in the Board’s Implementation policy. Each employee whose performance exceeds minimum criteria established by the employee’s supervisor should be eligible for Performance-Based Incentive Compensation.

- I. Employees who receive an overall summary rating unsatisfactory performer for either Responsibilities or Terms And Conditions of Employment on their performance evaluations will not receive performance based salary increases on the authorized date.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 13 of 15**

- II. Employees not approved to receive performance based salary increases on the authorized date are not eligible for such increases at any other time during the year.
- III. Employees who are not in pay status on the date increases are authorized, but are approved for performance based salary increases, will receive such increases upon their return to pay status. Appropriate supervisors must notify Human Resources to enter the performance increase along with the notice of return to pay status.
- IV. The State Personnel Board releases guidelines that will be followed by SBHS to implement salary increases for each evaluation period for employees who is a successful performer minus or exceptional performer.
  - A. Employees who receive an overall summary rating of successful performer minus on PMF evaluations will receive the standard increase based on the amount identified for the evaluation period.
  - B. Employees who receive an overall summary rating of exceptional performer on PMF evaluations will receive the standard increase plus a lump sum payment identified for the evaluation period.
  - C. Special provisions regarding the calculation of performance based salary increases for employees who transfer between State agencies during the period of July 1 through September 30 may be included in the State Personnel Board guidelines.
  - D. SBHS budget for performance based salary increases will be reviewed at least on an annual basis. Each year, a specific amount of funding is allocated for performance based salary increases.
    - 1. Due to limited funds, the increase amounts may be reduced if SBHS exceeds its allocated budget.
    - 2. If the increase amounts must be reduced, the reduction percentage will be the same for all employees of SBHS who receive performance based salary increases.
  - E. Unless otherwise authorized by the State Personnel Board, the following limitations apply:
    - 1. Employees who are at or above the pay grade maximum salary for their jobs are not eligible for performance based salary increases.
    - 2. Performance based salary increases for employees who are near the pay grade maximum can only be granted up to the pay grade maximum.

**SUBJECT: Performance Management**

**Policy HR-10.01**

**Page 14 of 15**

**COORDINATION WITH OTHER PERSONNEL POLICIES:**

Promotions, demotions, performance based salary increases, corrective actions or reductions in force should be consistent with the most recent overall rating of the employee's performance.

**REFERENCES:**

- I. Rules of the State Personnel Board-Rule14 (Performance Management)
- II. Rules of the State Personnel Board-Rule12 (Salary)
- III. Rules of the State Personnel Board-Rule 10 (Classification Plan)

**ATTACHMENTS:**

- I. [Instructions For Use Of PMF](#)
- II. [Performance Management Form MS Form](#)
- III. [Instructions For The Use of Management Review](#)
- IV. [Management Review Form SBHS Form 953](#)
- V. [Memorandum Performance Plan Review SBHS Form 588](#)
- VI. [Memorandum Performance Evaluation Review SBHS Form 422](#)
- VII. [Instructions For Performance Management Review For Hourly Employees SBHS Form 962](#)
- VIII. [PMF for Hourly Employees SBHS Form 962](#)

**APPROVAL SECTION:**

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Chief Executive Officer

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Date

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Committee Chairperson

\_\_\_\_\_  
Date

**RESCISSION SECTION:**

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Chief Executive Officer

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Date

**SUBJECT: Performance Management  
Policy HR-10.01  
Page 15 of 15**

**REVIEW SECTION:**

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Committee Chairperson

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Date

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Committee Chairperson

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Committee Chairperson

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Date