



OFFICE OF HUMAN RESOURCES

Creating an Effective Performance Improvement Plan

An effective Performance Improvement Plan (PIP) will provide an opportunity for you ("supervisor") to address below standard performance with the employee. The PIP should clearly outline a specific area ("job element") and function ("related task") where there is an expectation for improved performance. The expectation provided should be specific ("performance standard"), and measurable ("measurement"). The PIP should provide a tangible review period ("improvement timeframe") where the employee can achieve a performance improvement. You will meet with the employee ("follow-up date") to discuss the progress made during the improvement timeframe. This PIP should incorporate input from the impacted employee, and may be required per the employee's Collective Bargaining Agreement (CBA) after issuing a written reprimand as a step in the progressive intervention (discipline) process (see respective CBA). A PIP is also a useful tool to assist an employee to meet District expectations after receiving an evaluation with an overall rating of "below standards".

STEP ONE – Draft PIP

Job Element

The Job Element is the overall area rated "below standards" during a performance evaluation. A particular job element might be noted multiple times on the same PIP for separate "related tasks". Examples of job elements include:

- Time & Attendance
- Customer Service

Related Task

Related Task is the specific function or duty within the Job Element which requires immediate improvement. Examples of related tasks to the above referenced job elements include:

- Observe assigned work schedule
- Respond in a timely manner to emails and voicemails

Measurement

Measurement is the quantitative tool used to rate the actual performance on a specific task against the expectation of performance. The expectation being met would constitute a "meets standards" rating of the performance evaluation. Examples of the measurement to the above referenced related tasks include:

- 8:00 am-5:00 pm (lunch: 12:00 pm-1:00 pm)
- Within one working day

Performance Standard

Performance Standard is a stated directive for the related task and incorporates the measurement. Examples of a performance standard to the above referenced measurement include:

- Arrive to your workstation promptly at 8:00 am daily
- Respond to all emails within one working day of receipt

Improvement Timeframe

Improvement Timeframe is the period in which performance will be reviewed in order to determine whether appropriate next steps are warranted. General practice would be 30, 60, or 90 days. Time & Attendance is generally reviewed over a 90 day period.

Follow-up Date

Follow-up Date is when the employee can expect to receive feedback on progress towards improvement. General practice would be weekly, biweekly, semimonthly or monthly. The follow-up date should not take the place of providing your employee regular positive feedback and/or verbal warning for performance or misconduct issues.

Example

Job Element	Related Task	Measurement	Performance Standard	Improvement Timeframe	Follow-up Date
Time & Attendance	Observe Assigned Work Schedule	8:00 am-5:00 pm (lunch 12:00 pm-1:00 pm)	Arrive to your workstation promptly at 8:00 am daily.	90 days	2/28/2020 3/31/2020 4/30/2020
Customer Service	Respond to Emails and Voicemails	Within one working day	Respond to all emails within one working day of receipt.	30 days	2/28/2020

STEP TWO – Draft to Human Resources

Prior to meeting with the employee, the draft PIP must be reviewed and approved by Human Resources. This will ensure that the performance being addressed is done so in an objective manner, conforms to the collective bargaining agreement where applicable, and is adequately documented. In addition, the draft PIP is reviewed to ensure it is specific, measurable, relevant, and attainable within the improvement timeframe. Human Resources will provide you with feedback and possible recommendations.

STEP THREE – Meet with the Employee

This meeting plays an important role providing an opportunity for you to discuss with the employee areas requiring immediate improvement and the proposed plan of action. The employee will have the opportunity to provide input and feedback that may result in modifications made in the draft PIP. Changes made to the draft with the employee's input adds value. However, care must be taken so that proposed changes would not affect the integrity of the PIP. Once finalized, obtain all required signatures and provide a copy to the employee, maintain a copy for your records, and **forward the original to Human Resources.**

Please note: If significant changes are made to the draft PIP, Human Resources must review the document prior to finalization and signatures.

STEP FOUR – Follow-up with the Employee

During your initial meeting with the employee, follow-up dates were determined. Setup a calendar event to schedule all follow-up meetings and ensure that they occur as planned. In all follow-up meetings, you will discuss with the employee,

and document, the progress towards improving their performance. These meetings should provide the employee an opportunity to ask questions, obtain clarification on performance expectations, and request any additional tools, resources, and/or training that will assist them in improving performance.

STEP FIVE – PIP Conclusion

Standard Met

Once the end of improvement timeframe has been reached, you will determine if the employee has shown significant improvement that would meet the District's expectations outlined in the performance standard. If the objectives have been met, the employee should be notified that the PIP has been closed and the expectation is that this performance continues.

Standard Partially Met

If the employee has shown some progress towards meeting the expectations, but has not met all performance standards outlined in the PIP you will want to discuss with Human Resources follow-up action, including extending the PIP improvement timeframe or progressive discipline.

Standard Not Met

If the employee has not shown significant progress towards meeting the expected performance standards outlined in the PIP, you will want to discuss with Human Resources follow-up action, including extending the PIP improvement timeframe or progressive discipline.