

A Quick Guide for Supervisors: Setting Up the Introductory Period Performance Plan

For all new regular staff members, the Introductory Period consists of the first four months of employment at the University (for hires who are internal transfers from another Penn employer, the period is three months). This period is used to determine if the staff member's performance meets the expectations of the position and if continued employment is warranted.

The introductory period is managed in Workday and consists of three parts:

1. An initial, goal-setting session conducted by the manager for the new hire.
2. An interim evaluation at the midpoint of the introductory period to report on performance to date and reinforce expectations.
3. A closing evaluation, including a performance rating and recommendation, to be completed by the end of the introductory period and acknowledged by the new hire.

When the new staff member's onboarding has been completed, managers are prompted by a Workday notification to log in and set up an [Introductory Period Performance Plan](#) for their new staff. **This plan must be established and reviewed with the new hire within the first week of employment.** Workday will prompt managers and staff throughout the completion of the process.

Establishing Goals:

Setting performance goals helps staff understand what is expected of them in the early months of their employment and provides clear strategic direction for the future. Managers should set between four and six goals that are reasonably achievable during the introductory period (longer-term goals may also be included, provided there is a segment that can be completed during the introductory period).

Goals can be based on:

- *Performance/Operational Efficiencies*: generally related to the position's core responsibilities
- *Projects/Initiatives*: temporary endeavors with a defined beginning and end; separate from routine work
- *Job Profile Competencies*: pre-populated in the staff member's introductory plan; includes five core competencies and five that are tied to the specific job-family
- *Professional Development*: related to the completion of required training, certifications, etc.

Goals should follow the SMARTS criteria:

- Specific
- Measurable
- Achievable
- Results Oriented
- Time Bound
- Stretch

Managing Performance:

During the introductory period review process, the supervisor should:

- meet with the staff member regularly to discuss performance and provide constructive feedback as to whether they are meeting the expectations for the position, determine if additional training is needed, and, if necessary, provide a plan for improvement;
- complete the midpoint introductory period appraisal and provide detailed feedback on staff progress at meeting goals and expectations;
- regularly recognize the staff member's achievements;
- inform ASC HR immediately if there are concerns about performance, meeting goals, etc.

Extending the Introductory Period:

If a new staff member is *not* meeting the required performance expectations of the position by the midpoint of the introductory period, the supervisor should inform ASC HR. If additional time is needed to make a determination, the introductory period may be extended by a maximum of eight (8) months, in consultation with ASC HR and Core HR/Staff & Labor Relations. Only one extension may be requested, and it must be made prior to the end of the initial introductory period.

The supervisor and ASC HR must meet with the staff member to explain the extension, and a letter detailing the extended time period and areas that need improvement must be provided.

Additional Information:

- Additional information about the Introductory Period can be found [here](#) and [here](#).
- A Workday tipsheet with step-by-step instructions can be found [here](#).
- For personal assistance, please email manny.mavroleon@asc.upenn.edu.