



## STANDARD ADMINISTRATIVE PROCEDURE

### 33.99.03.M0.01 Performance Management and Review Procedure for Non-faculty Employees

*Approved December 18, 2003*

*Revised May 5, 2005*

*Revised April 28, 2008*

*Revised December 14, 2009*

*Revised November 7, 2014*

*Revised July 25, 2019*

*Next scheduled review: July 25, 2024*

#### Standard Administrative Procedure Statement

This standard administrative procedure establishes the Performance Management process for all eligible non-faculty employees, including research staff, of Texas A&M University. This process does not modify the “at will” status of any University non-faculty employee. The provisions of this SAP do not apply to student workers, graduate assistants, wage and temporary employees.

#### Definitions

**Performance Management Process** - the ongoing process by which a manager clarifies employee performance expectations, provides feedback and coaching, completes the annual performance review, and recognizes performance as merited.

**Performance Review Period** - the 12-month period of time for which employee performance is evaluated. Texas A&M has set the period from April 1 through March 31 as the standard performance review period.

**Performance Review Delivery Period** - the delivery period for a manager to discuss and document performance feedback with his/her employee. Texas A&M has set the annual standard review delivery period as April 1 through May 31.

**Workday** - the software system used by Texas A&M System members to manage Human Resource (HR) related processes such as Performance Review.

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## Official procedure

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1. The annual performance management process for each non-faculty employee of Texas A&M University will include reviewing the position description and creating performance goals at the beginning of the performance year, regular performance management discussions throughout the year, and evaluating performance at the end of each review period.
  - 1.1 The department or unit head is responsible for ensuring goals are created and reviews are conducted for each eligible employee and may delegate this process to the employee's manager.
2. The annual performance review shall be completed and delivered during the performance review delivery period.
  - 2.1 Variations and extensions to either the performance review period or the performance review delivery period for departments and units to meet unique operational requirements must be approved by the Division of Human Resources & Organizational Effectiveness (HROE) or Texas A&M University Galveston Human Resources (HR) for Galveston campus employees.
  - 2.2 Extensions to the approved completion date for an individual employee because of extenuating circumstances, such as absence or illness, must be approved by the appropriate department or unit head or Texas A&M University Galveston Chief Operating Officer (COO) for Galveston campus employees.
3. REVIEW OF POSITION RESTRICTIONS
  - 3.1 The Position Restrictions shall be reviewed at the beginning of the performance review period for an existing employee or within the first thirty (30) days for a newly hired, promoted or transferred employee.
  - 3.2 The manager and employee indicate whether or not the Position Restrictions need to be updated as part of the prior year's Performance Review in Workday.
  - 3.3 If the Position Restrictions requires changes, the manager should work with their Human Resources (HR) Liaison or Texas A&M University Galveston HR for Galveston campus employees to revise the Position Restriction in Workday.
  - 3.4 For employees in research titles, the manager and employee may, at the discretion of the dean and department head, follow a modified Position Restriction review and acknowledgement process established by the Division of Research.

#### 4. CREATE PERFORMANCE GOALS

- 4.1 The employee or manager creates the Performance Goals in Workday accessed from SSO. If the employee creates the Performance Goal, it will route to the manager to approve in Workday. If the manager creates the Performance Goals, it is automatically approved in Workday.

#### 5. CONDUCT AND DOCUMENT EVALUATION REVIEW

- 5.1 The manager meets with employee to discuss performance, including the overall rating, during the performance review delivery period.
- 5.2 Department or unit head, or designee, may require employees to provide self evaluations as a means of gathering employee input prior to the supervisor completing the performance review.
- 5.3 The manager accesses Workday through SSO to record individual ratings and comments, or at the discretion of the VP, Dean, Department Head, or COO approval for Texas A&M University Galveston campus, attaches a department-tailored document in Workday to record performance. The manager documents the overall rating, whether or not there is any outstanding required training, whether or not the manager discussed the evaluation with the employee, and whether or not the Position Restriction needs to be updated in Workday. The manager then submits the performance review in Workday to be routed to the employee. The employee acknowledges the review and documents whether or not the Position Restriction needs to be updated. For Texas A&M University Galveston, unless otherwise approved by the COO for extenuating circumstances, employees must be up to date on Texas A&M System required training to be eligible for merit. Refer to [Regulation 33.05.02](#) for information on required training.
- 5.4 Any incomplete performance reviews in Workday will be cancelled by HROE, Texas A&M University Galveston HR or the Texas A&M System Workday Services team to enable the subsequent year's performance review business process.

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#### Resources

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Training, frequently asked questions, and navigational aids for Performance Management and Workday Performance Review are available at <http://performancemanagement.tamu.edu>.

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**Related Statutes, Policies or Regulations**

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System Regulation 33.99.03, *Performance Evaluations for Non-Faculty Employees*  
<http://policies.tamus.edu/33-99-03.pdf>

System Regulation 33.05.02: *Required Employee Training*  
<http://policies.tamus.edu/33-05-02.pdf>

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**Contact Office**

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For more information or clarification on this SAP, contact Human Resources & Organizational Effectiveness by email at [HRevaluations@tamu.edu](mailto:HRevaluations@tamu.edu) or [hr@tamug.edu](mailto:hr@tamug.edu) for Texas A&M Galveston employees.

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