



Procedure Owner:	Vice President Finance and Administration			 <p>جامعة حمد بن خليفة HAMAD BIN KHALIFA UNIVERSITY عضو في مؤسسة قطر Member of Qatar Foundation</p>
Responsible Unit:	Human Resources Directorate			
Procedure Name:	Performance Management			
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## Performance Management Procedure

Ver.	Approval Date	Effective Date	Type of Change	Approved by
00	21/05/2026	21/05/2026	Initial Release	President

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## 1 Purpose

This procedure establishes the steps for implementing performance management at Hamad Bin Khalifa University (HBKU), including objective setting, performance monitoring, mid-year reviews, annual appraisals including calibration, and appeal. It ensures that performance management activities are conducted in a consistent, timely, and effective manner across the University, and that performance expectations are clearly defined, monitored, and documented.

## 2 Scope

This procedure applies to all HBKU employees under the permanent, fixed-term, and rolling-term employment categories, as defined in the Employment Categories Policy.


This procedure does not apply to Faculty members (individuals holding Assistant Professor, Associate Professor, Professor, or equivalent titles), whose performance management is governed by the Faculty Performance Management Policy.

This procedure also does not apply to limited-term employees, honorary employees, freelancers, short-term employees, service workers, visiting faculty and scholars, adjuncts, affiliates, postdoctoral scholars, graduate assistants, student employees, volunteers, trainees, interns, and independent contractors, as defined in the Employment Categories Policy.

## 3 Terms, Abbreviations, and Definitions

The following terms and abbreviations used in this procedure shall have the meanings defined below:

Term	Definition
Appeal Committee	A formally constituted body established to review and decide on appeals submitted by Employees regarding decisions made under this procedure.
Appraiser	Line Manager or the person designated by EPMT to act as the Appraiser
Employee / Appraisee	Employee eligible for appraisal
Line Manager (LM)	Appraisee's Direct Line Manager
EE	Exceeds Expectations Rating
EPMT	Employee Performance Management Team
ER	Employee Relations
Final Approver/Reviewer	The manager exercising supervisory authority at the level immediately above the Line Manager. Where the Line Manager is at the N-1 level, the Line Manager shall assume the role of Final Approver.
HBKU or the University	Hamad Bin Khalifa University
HBKU Unit	An organizational unit within HBKU such as Colleges, Schools, Research Institutes, Centers, Departments, or Offices.
HR	Human Resources Directorate
HR FP	Human Resources Focal Point assigned to an HBKU Unit
HRD	Human Resources Director
ME	Meeting Expectations Rating
N-1	Provost, Vice Presidents reporting directly to President, and Executive Directors reporting directly to President.
NI	Needs Improvement Rating
OS	Outstanding Rating
PIP	Performance Improvement Plan
Poor Performer	Employee with a performance rating of "Needs Improvement" or "Unsatisfactory"

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President	President of Hamad Bin Khalifa University
Performance Management System	HBKU system where HR tracks the performance of Employees in a manner that is consistent and measurable.
Performance Management Guidelines	The annual performance management related instructions issued by the Human Resources Directorate including rating criteria, calibration parameters (distribution thresholds), timelines, and procedural requirements.
US	Unsatisfactory Rating
VPFA	Vice President Finance and Administration

## 4 Roles and Responsibilities

The roles and responsibilities defined in this section establish the accountability and oversight of all parties involved in the Performance Management cycle and shall be implemented in accordance with this procedure and the Performance Management Policy.

### 4.1. Line Managers are responsible for:


- 4.1.1. Setting and agreeing on performance objectives with Employees in alignment with organizational priorities.
- 4.1.2. Providing ongoing feedback, coaching, and performance guidance throughout the performance management cycle.
- 4.1.3. Monitoring Employee performance against objectives and competencies.
- 4.1.4. Conducting mid-year review and annual appraisal.
- 4.1.5. Ensuring performance evaluations are objective, evidence-based, and aligned with performance criteria.
- 4.1.6. Documenting and maintaining appropriate records of performance discussions and outcomes.
- 4.1.7. Identifying Poor Performers and initiating PIP, in coordination with HR, where appropriate.
- 4.1.8. Cooperating with HR, Heads of HBKU Units, and relevant stakeholders in performance review, validation, and calibration processes.

### 4.2. Employees are responsible for:

- 4.2.1. Actively participating in all stages of the performance management cycle, including objective setting, mid-year review, and annual appraisal.
- 4.2.2. Collaborating with LMs to set and agree on performance objectives aligned with the concerned HBKU Unit and University priorities.
- 4.2.3. Ensuring that agreed objectives are accurately recorded in the Performance Management System within defined timelines.
- 4.2.4. Monitoring their own performance against agreed objectives.
- 4.2.5. Completing self-assessments and providing relevant supporting information or evidence, where required.
- 4.2.6. Participating in performance discussions with the Appraiser and seeking clarification or feedback where needed.
- 4.2.7. Communicating any challenges impacting performance in a timely manner.
- 4.2.8. Identifying development needs and engaging in agreed learning and development activities.
- 4.2.9. Engaging in and fulfilling the requirements of the Performance Improvement Plans (PIP), where applicable.
- 4.2.10. Completing all required performance management activities within the defined timelines and in accordance with this Procedure.

### 4.3. Human Resources Focal Points are responsible for:

- 4.3.1. Acting as the primary point of contact between HR and assigned HBKU Units.
- 4.3.2. Supporting LMs, Appraisers, and Appraisees throughout the performance management cycle.


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- 4.3.3. Providing guidance on process requirements, timelines, and system usage.
- 4.3.4. Monitoring progress and identifying delays, gaps, and non-compliance.
- 4.3.5. Coordinating with LMs, Appraisers, Heads of HBKU Units, and HR to support performance review and validation processes, including calibration.
- 4.3.6. Follow up with Appraisers to ensure timely submission of annual appraisals.
- 4.3.7. Provide guidance on PIP implementation and ensure compliance with Performance Management Guidelines.
- 4.3.8. Supporting documentation, reporting, and communication related to performance management activities.
- 4.3.9. Supporting the coordination of the appeal process.
- 4.4. **The Employee Performance Management Team** is responsible for:
  - 4.4.1. Managing and maintaining the Performance Management System.
  - 4.4.2. Administering the performance management cycle in coordination with HR.
  - 4.4.3. Sharing the Performance Management Guidelines, communications, and timelines for each cycle communicated by HR.
  - 4.4.4. Providing training, guidance, and ongoing support to LMs, Appraisers, Appraisee, and HR FPs in accordance with Performance Management Guidelines.
  - 4.4.5. Monitoring completion of performance management activities and maintaining records.
  - 4.4.6. Preparing reports on performance progress, compliance, and performance rating distributions.
  - 4.4.7. Supporting performance review and validation processes, including calibration, in accordance with Performance Management Guidelines.
  - 4.4.8. Supporting the administration of the appeal process and tracking its outcomes.
  - 4.4.9. Supporting the handling of special cases in coordination with HR.
- 4.5. **The Human Resources Director** is responsible for:
  - 4.5.1. Overseeing the implementation of the performance management cycle.
  - 4.5.2. Providing oversight on compliance, consistency, and effectiveness of performance management practices.
  - 4.5.3. Issuing Performance Management Guidelines, communications, and timelines for each cycle.
  - 4.5.4. Ensuring alignment of Performance Management Guidelines with institutional priorities, regulatory requirements, and budget considerations.
  - 4.5.5. Managing and overseeing the appeal process.
- 4.6. **N-1 / Heads of HBKU Units / Final Approvers** are responsible for:
  - 4.6.1. Reviewing and validating performance ratings to ensure consistency and alignment with Performance Management Guidelines.
  - 4.6.2. Providing direction and oversight to LM on performance management matters.
  - 4.6.3. Ensuring adherence to defined processes and timelines.
  - 4.6.4. Supporting resolution of escalated cases, including appeals where required.
  - 4.6.5. Reviewing and endorsing post-cycle rating adjustments in accordance with this Procedure and the Performance Management Guidelines.

## 5 Procedure

### 5.1 General


- 5.1.1. All eligible HBKU employees shall use the Performance Management System to complete the performance management activities including objective settings, mid-year reviews, and the annual appraisal process.
- 5.1.2. All performance management activities shall be completed within the timelines communicated by HR.

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- 5.1.3. HR FP shall monitor progress and support completion of performance management activities across HBKU Units.
- 5.1.4. The annual appraisal process shall include assessment of the level of achievement of the defined objectives and assessment of competencies and shall be based on the following weightage distribution:
  - Objectives: 80%
  - Competencies: 20%
- 5.1.5. In exceptional operational circumstances, selected HBKU Employees may complete the annual appraisal process using manual forms specifically approved for this purpose, subject to prior written approval from HRD.
- 5.1.6. For Employees seconded from HBKU to other institutions, manual appraisal forms shall be completed and submitted to HBKU for record-keeping purposes.
- 5.1.7. EPMT shall issue annual Performance Management Guidelines in advance of the annual appraisal process.
- 5.1.8. HR FP shall support Appraisees, Appraisers, and LMs during the annual appraisal process in accordance with the Performance Management Guidelines.
- 5.1.9. LMs shall be accountable for ensuring completion of all performance management activities for Appraisees under their supervision.
- 5.1.10. If an Employee reports to more than one LM during an appraisal period, including in cases of transfer, promotion, or change in reporting line, the LM who supervised the Employee for the greater amount of time during the performance year shall assume the role of Appraiser and complete the annual appraisal process. However, input from the other relevant LMs, when available, shall be considered. The EPMT shall adjudicate cases which are not clear.

## 5.2 Objective Setting Narrative


Objective Setting General Principles	
5.2.1	Objectives are agreed upon between Employees and LMs at the beginning of each performance management cycle and must be aligned with the Employee's roles and responsibilities, the concerned HBKU Unit objectives and priorities, and the University strategic objectives and priorities.
5.2.2	Objectives shall be clear, measurable, and recorded in the Performance Management System.
5.2.3	Employee should set between 3 to 8 objectives per performance management cycle.
5.2.5	Objectives shall be subject to review and validation by the LM, where applicable.
5.2.6	Any approved changes to objectives shall be recorded in the Performance Management System.
Step	Action
1	Employee and LM agree on a set of objectives and the pre-set competencies as applicable to the Employee's role and responsibilities.
2	Employee enters and submits agreed objectives in the Performance Management System within ten (10) working days from the opening of the objective-setting activity. Failure by the Employee to submit objectives within the defined timeline results in loss of the right to appeal annual appraisal ratings.
3	LM shall review the objectives submitted by the Employee within ten (10) working days of submission. <ul style="list-style-type: none"> <li>• If approved, LM shall approve the objectives in the Performance Management System.</li> <li>• If not approved, LM shall discuss the objectives with the Employee and seek agreement on a revised set of objectives to be updated in the system. If no agreement is reached between the LM and the Employee, the case should be reported to EPMT with</li> </ul>

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	<p>justifications submitted by both the LM and the Employee. The EPMT will attempt to have the Employee and LM reach agreement. In case no agreement is reached, the case is forwarded to the Final Approver who will decide on a final set of objectives.</p> <p>If the LM does not approve objectives within ten (10) working days of submission, the objectives shall be automatically approved in the Performance Management System.</p> <p>LM shall maintain records of performance discussions, including feedback, and critical incidents, in the Performance Management System or through other documented means.</p>
4	Where objectives are not submitted by the Employee, the LM is responsible for ensuring that Employee objectives are entered and recorded in the Performance Management System.
5	Once the objectives are approved, the Performance Management System is made available to track progress throughout the performance management cycle, where the Employee can update the status of the objectives, and the LM to provide feedback. Objectives can also be adjusted throughout the performance management cycle based on business needs and subject to approval by the LM.

### 5.3 Mid-Year Review Narrative


Mid-Year Review General Principles	
5.3.1	The Mid-Year Review is a formal checkpoint within the performance management cycle to assess progress against approved objectives and pre-set competencies, provide feedback, and support performance improvement.
5.3.2	The Mid-Year Review is conducted within timelines communicated by HR.
5.3.3	Approved objectives may be revisited and updated during the Mid-Year Review, where justified and in accordance with this Procedure.
Step	Action
1	The EPMT announces the Mid-Year Review cycle timelines and provides HR FP with Performance Management Guidelines and support as needed.
2	HR FP share the Performance Management Guidelines with Employees and LMs
3	<p>LM meets with each Employee to review progress against approved objectives and defined milestones.</p> <p>LM discusses competencies and expected behaviors with the Employee and provides constructive feedback to the Employee on performance during the Mid-Year Review discussion.</p> <p>Where updates to objectives are required, the LM requests reopening of objectives through the HR FP within the defined timeline.</p> <p>In case of critical incidents or unsatisfactory progress towards achieving the objectives, the LM shall record feedback and comments in the Performance Management System.</p>
4	When objectives are reopened, Employee update, within the defined timelines, objectives in the Performance Management System (add/modify/delete), as applicable.
5	<p>If objectives are updated, LM shall review the updated objectives submitted by the Employee within the defined timelines.</p> <ul style="list-style-type: none"> <li>If approved, LM shall update the progress status for each objective in the Performance Management System and confirm completion of the Mid-Year Review.</li> <li>If not approved, LM shall discuss the updated objectives with the Employee and agree on a revised set of objectives. LM shall update the progress status for each objective in the Performance Management System and confirm completion of the Mid-Year Review. If no agreement is reached between the LM and the Employee, the case should be reported to EPMT with justifications submitted by both the LM and the Employee. The EPMT will attempt to have the Employee and LM reach agreement. In case no</li> </ul>

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	<p>agreement is reached, the case is forwarded to the Final Approver who will decide on a final set of updated objectives.</p> <p>If LM does not approve the updated objectives within the defined timelines, the submitted objectives shall be deemed approved and carried forward to the annual appraisal for evaluation.</p>
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#### 5.4 Annual Appraisal – Narrative


Annual Appraisal General Principles	
5.4.1.	The annual appraisal is the formal evaluation of Employee performance that happens once at the end of the performance management cycle.
5.4.2.	The LM assesses performance against approved objectives and pre-set competencies, in accordance with the standard performance rating scale defined in the performance management policy.
5.4.3.	The annual appraisal is conducted within timelines communicated by HR.
5.4.4.	Final performance ratings are subject to validation and calibration to ensure consistency, fairness, and alignment across the University.
5.4.5.	Where the LM is also the Final Approver, the appraisal does not proceed to a higher authority.
Step	Action
1	The EPMT announces the initiation (go-live) of the annual appraisal process and the process timelines.
2	Following receipt of the annual appraisal process go-live communication, Employee access the Performance Management System and complete a self-assessment on the competencies and objectives recorded in the performance management system by providing self-ratings, justifications, comments, examples, and supporting evidence against each competence and objective.
3	<p>Within ten (10) working days from annual appraisal cycle go-live announcement, Employee must submit the completed self-assessment to the LM through the Performance Management System for review and rating.</p> <p>Where the Employee does not submit the self-assessment within ten (10) working days:</p> <ul style="list-style-type: none"> <li>• Appraisal is automatically moved to the LM for action;</li> <li>• Employee loses the right to appeal against the final rating; and</li> <li>• Employee loses the right to financial incentive linked to performance.</li> </ul>
4	LM reviews the self-assessment and sets the meeting with the Employee to discuss the rating in accordance with the annual appraisal process timeline.
5	<p>LM meets with the Employee to discuss the Employee’s performance. This meeting is a mandatory requirement and shall be conducted face-to-face where possible.</p> <p>LM ensures the discussion covers:</p> <ul style="list-style-type: none"> <li>• Performance against objectives and competencies</li> <li>• Areas for improvement</li> <li>• Training and development needs</li> <li>• Opportunity for the Employee to provide comments</li> </ul>
6	<p>LM completes and submits the Employees’ appraisal in the Performance Management System by rating the Employee’s performance against each objective and competency providing comments and justifications as needed.</p> <p>Where applicable, the appraisal results submitted by LM will be communicated to the Final Approver for approval.</p> <p>LM shall provide mandatory justifications and supporting evidence where competencies or objectives are rated as “OS”, “EE”, “NI”, or “US”.</p>

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	LM provides mandatory overall performance feedback in the Performance Management System. If LM does not submit the appraisal results within ten (10) working days of receiving the Employee's self-assessment and does not request an extension, the appraisal is moved to the Final Approver and the LM may be subject to management accountability consequences as approved for the year.
7	The Final Approver reviews the appraisal results within five (5) working days and may approve or return it to LM for correction.
8	If the Final Approver returns the appraisal results to LM, the LM makes necessary updates and resubmits the appraisal in the Performance Management System.
9	Once approved by the Final Approver, the appraisal result is set in the Performance Management System.
10	If the Final Approver does not complete the appraisal within five (5) working days, the LM rating will be considered as the final rating
<b>Calibration Process</b>	
11	Upon closure of annual appraisal timelines, the EPMT consolidates the results and shares the below reports with HRD: <ul style="list-style-type: none"> <li>• Employees with missing ratings</li> <li>• Final rating report highlighting high (EE or OS performance rating) and Poor Performers</li> <li>• Employees with recently closed PIP and subsequent NI/US ratings</li> <li>• LM who did not complete appraisals</li> <li>• Employees who did not complete self-appraisal</li> <li>• Performance management guidelines for calibration</li> </ul>
12	HRD will review the reports and initiate the calibration process by sharing the reports with Respective N-1
13	EPMT in collaboration with N-1 and HR FPs will ensure the following is completed within ten (10) working days: <ul style="list-style-type: none"> <li>• Obtain missing ratings and approvals</li> <li>• Apply average of three years' ratings where no LM rating is available</li> <li>• Escalate non-compliant LM for accountability consequences</li> <li>• Validate NI/US ratings and confirm Poor Performers</li> <li>• Review PIP-related cases and obtain required approvals</li> <li>• Identify consecutive Poor Performers and decide on actions</li> </ul> Once ratings are aligned, HR FP submits the Employee rating list to the EPMT for validation.
14	The EPMT validates rating distributions against performance management guidelines and returns cases for correction to the relevant HR FP and respective N-1. If the calibration guidelines are met, EPMT will share the consolidated list with HRD for endorsement.
15	HRD reviews the outcome and endorses the calibration changes made that are aligned with calibration thresholds for the VPFA Approval.
16	VPFA approves or returns the rating list for correction within five (5) working days
17	Upon final approval, the annual appraisal process is completed and EPMT announces the appraisal rating to LMs and Employees.

## 5.5 Appeal – Narrative

<b>Appeal General Principles</b>
5.5.1. The appeal process allows Employees to formally contest specific competency or objective ratings within a defined timeframe following the communication of final appraisal ratings.
5.5.2 Appeals shall not be filed against the overall performance rating. Appeals must be filed against specific competency and/or objective ratings.

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5.5.3 If no appeal is raised within five (5) working days, the announced rating will be considered as final.	
5.5.4 Prior to the start of the appeal process, the Appeal Committee is formed as advised by HRD to be chaired by a member of the HR team designated by the HRD. For each appeal filed by an Employee, the Committee should include at least one member from the relevant HBKU Unit who is familiar with the Employee's performance during the most recent appraisal cycle to serve on the Committee for that specific case. All members of the Committee must have completed at least one year of employment at HBKU.	
5.5.5 The process is managed by HR which responsibilities include gathering evidence through HR FPs, assigning of committee, and concluding cases, subject to EPMT review, HRD endorsement, and VPFA approval.	
5.5.6 All appeals shall be supported by documented evidence and resolved within defined timelines to ensure fairness, consistency, and alignment with the Performance Management Guidelines.	
5.5.7 Upon completion of the appeal process, ratings are considered final.	
5.5.8 All appeal submissions, reviews, and outcomes shall be recorded in the approved Performance Management System.	
Step	Action
1	Within five (5) working days of receiving appraisal rating notification, an Employee may contest specific competency and/or objective ratings (not the overall rating) by sending official email to LM, including supporting evidence, copying HR FP.
2	Upon receipt of the Employee's email contesting the competency and/or objective ratings, LM reviews the case and may consult with the relevant HBKU Unit head to reach a decision to be communicated to the Employee within five (5) working days from receiving the Employee's email contesting the ratings. The LM should conduct a meeting with the concerned Employee and document the outcome of the meeting.
3	If the decision is not to change the rating, then the outcome and justification shall be communicated by the LM through system email to the Employee, copying HR FP and EPMT. If the LM decides to change the rating and the change does not result in exceeding the calibration thresholds, then approval by the Final Approver is required. If the new rating results in exceeding the calibration thresholds, then the process continues at step 8 below.
4	Employee must respond within two (2) working days of receiving the LM response. If the employee is satisfied with the response or if there is no response from Employee within two (2) working days from receiving the LM response, then the rate is final and the Employee forfeits the right to an appeal. If the Employee is not satisfied with the response, the Employee may file an appeal through the system/formal email to the HR FP/EPMT with supporting evidence.
5	HR FP compiles all evidence, decisions, and documentation and submits the appeal file to EPMT for communication to the Appeal Committee.
6	The committee to finalize the case within fifteen (15) working days and to submit the Committee recommendation to EPMT and HRD for review.
7	HRD reviews the recommendation and endorse it for VPFA approval.
8	VPFA reviews the recommendations and responds within five (5) working days. VPFA reviews and decides as follows: <ul style="list-style-type: none"> <li>• Approves rating change within Performance Management Guidelines;</li> <li>• Approves rating change subject to President approval where exceeding calibration thresholds; or</li> <li>• Rejects the recommendation and maintains original rating.</li> </ul> At this stage, the appeal process is closed.

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9	<p>EPMT formally documents and communicates the final decision via email to the Employee, LM, concerned Head of concerned HBKU Unit, and ER.</p> <p>EPMT updates the outcome in the Performance Management System, where applicable. The Performance Management Cycle is formally closed. No further appeals or changes are permitted after VPFA/President approval.</p>
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## 5. Associated Guidelines, Forms, Templates, and other Supporting Documents

Self-Appraisal Form  
Performance Management Guidelines  
Performance Improvement Plan (PIP) Template  
Objective Setting Form/Template

## 6. References and Related Procedures

Performance Management Policy

## 7. Source, Responsible Office, Authority

The Vice President for Finance and Administration is the owner of this procedure. The Human Resources Directorate is responsible for the administration, implementation, and enforcement of this procedure. This Procedure was endorsed by the VPFA and the University Policy Officer and approved by the President.