



UA's Collaborative Performance Review Program

JANUARY 2, 2008

EMPLOYEE'S INFORMATIONAL GUIDE

VOLUME 1, NUMBER 1

Performance Review Form:

an employee's tool for assessing "individual" progress toward achieving UA's strategic destination.

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Answers to Frequently Asked Questions

The University of Akron's collaborative performance review program is designed to take a "snap shot" of an employee's performance during a specific timeframe as well as provide an opportunity for the employee and supervisor to establish goals and objectives for the upcoming review period based on current university initiatives. This informational guide has been prepared for employees who participate in UA's collaborative performance review program.

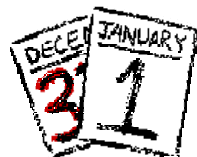
Program Background

UA's Annual Performance Review Form for regular employees was developed by The Development and Assessment of Personnel Task Force and presented to campus in 2001. This unit, created during 1999 as part of a University-wide strategic thinking process, was made up of contract professionals, staff employees, supervisors and faculty. A mandatory three-hour supervisory training program for all supervisors and managers was implemented to introduce the new program. President Proenza and his administration were the first group of management personnel to participate. The review process and form are considered to be an ever "evolving" process and form.

Each year the process and form are reviewed and updated to reflect UA's Academic Plan and current goals and objectives; directions from administration; and equally important, recommendations from employees and supervisors who complete the forms. For example, the 2003 form was modified to be "free flowing" based on employee suggestions. UA's Annual Performance Evaluation Form for "temporary" employees was introduced to campus in 2004 to meet the needs of supervisors who employ a large number of temporary employees.

Who is Covered

All full-time and part-time regular and temporary employees designated as Contract Professional, Unclassified Staff, Classified Staff, or Bargaining Unit Staff shall receive a performance review. Note some exceptions may exist.



Review Periods

The University's annual performance review period for regular and temporary employees currently reflects a calendar year for the time period of January 1 through December 31.

Probationary evaluations are conducted on/or before the completion of an employee's 60-days and 120-days of employment. Note some jobs which fall under UA's "public safety division" classification, serve a 365-day probation period for appointments, promotions, and transfers.

A Performance Review Form is designed to capture an employee's performance for a specific review period.

The review process provides the employee and supervisor with a chance to clarify performance expectations about the job and establish employee goals.

Goals and Objectives

- To serve as a measurement tool to assess your individual progress towards attaining university objectives as stated in the Academic Plan Scorecard
- To recognize and document your contributions and accomplished goals for a specific review period
- To support your development and continuous learning needs
- To provide a chance for you and your immediate supervisor to have a one-to-one collaborative discussion
- To clarify performance expectations for you and the unit
- Strengthen supervisor-employee work relationships
- To use to make personnel decisions (i.e., merit-based pay decisions, promotional decisions, etc.)

Types of Review Forms

Three performance review forms exist for non-faculty positions at the University:



- 1) *Annual Performance Review Form for Regular Employees*
- 2) *Annual Performance Evaluation Form for Temporary Employees*
- 3) *Probationary Performance Evaluation Form for Classified and Bargaining Staff Employees*

The forms are available at http://www.uakron.edu/hr/hrtraining/Perf_Reviews/Perf_review.php

Employee Status Changes that Affect the Review Process

Employees on Leave of Absence

If you are on leave of absence (i.e., medical, FMLA, educational, military, etc.) during the timeframe performance reviews are being conducted, no review will be conducted. *Note employees on leave of absence cannot receive a performance review until the employee returns to active status at work.*

Employees Serving as an Interim while Performing Permanent Job Duties

If you are filling in on an Interim basis while still performing your permanent job duties/responsibilities, you should complete a "regular" review form. You and your supervisor should assess your work performance for both jobs by appropriately dividing your work percentage of time between the two. For example, 60% of time spent performing interim duties and 40% of time spent performing permanent job duties.

Employees Temporarily Reclassified

If you are temporarily reclassified during a review period, you should be evaluated on the duties that you are currently performing during the review period.

Employees Promoted or Transferred to a New Job

If you are promoted or transferred to a new job during a review period, the new supervisor is responsible for conducting the performance review. The review form should reflect the modified review period dates and mention that the employee was transferred or promoted.

Employees with No Immediate Supervisor

If you currently do not have an immediate supervisor, your review should be conducted by the next level manager.

Employees in the Same Job but Reporting to a New Supervisor

If you are performing the same job but obtain a new supervisor during a review period, the new supervisor is responsible for conducting the performance review unless the previous supervisor is still available. In all instances, you and the new supervisor should establish goals together for the upcoming review period.

Training Registration Methods

Online:
www.uakron.edu/seminars

Phone:
330.972.7783

E-mail:
hrtraining@uakron.edu

Catalog of Trainings
www.uakron.edu/seminars

Session Dates & Times

A calendar of training dates, times, and locations is available at www.uakron.edu/seminars

T&DS Website
uakron.edu/hr/hrtraining

Appeals Procedures

On occasion an employee may wish to discuss differences or unresolved matters about his or her performance review with additional management personnel. The following performance review appeal methods are available to employees at the University.

In Person Appeal(s):

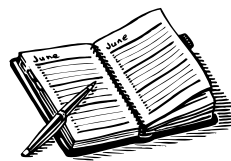
If you have concerns which you feel have not been resolved after discussing them with your immediate supervisor, you may request an appointment with the next level manager up to and including the vice president of your respective area.

Written Appeal(s):

In the event you continue to have a difference in opinion after meeting with appropriate management in your reporting structure, you have the option of following up with written comments which will become part of your permanent file maintained in Human Resources.

Should you wish to provide additional written comments about the review, the comments can be added directly onto the review form in the "Employee's Section" or as an addendum. Your written comments can be forwarded to Human Resources in two ways. You may attach your comments to the review form to be forwarded by your supervisor or you may submit your comments under separate cover. If you choose to send written comments, you must make sure that your written comments reflect that you wish to have them become part of your performance review file. Written comments should be forwarded to Human Resources, mail code +4732

Performance Logs



Throughout the year you may want to keep track of major accomplishments or updates about projects you are assigned. These notes will come in handy and make the process of completing your review form easier. An optional *Performance Log* has been developed for your use throughout the review period.

The form is available at http://www.uakron.edu/hr/hrtraining/Perf_Reviews/Perf_review.php

Forms Retention

The original *Annual Performance Review Form*, *Annual Performance Evaluation Form for Temporary Employees*, and *Probationary Evaluation Form* along with any attachments will be maintained by Human Resources Information Services (HRIS) as part of an employee's permanent record.

Optional *Performance Logs* should be maintained by the individual who created the log.

Available Trainings

Each year Training & Development Services provides training sessions for employees and supervisors to discuss any changes to the forms process and to inform new employees about the process in general. Additional performance management topics ranging from setting employee goals, giving and receiving constructive feedback, conducting collaborative performance reviews for supervisors, etc. are also available. It is anticipated that training sessions related to the annual performance review process will be made available prior to and during the review period established by administration.

