

### III. When to Conduct a Written Performance Assessment

Board of Trustees policy, collective bargaining agreements, and employee handbooks require that each employee receive an annual written Performance Assessment from his or her supervisor. Generally a written Performance Assessment is conducted:

- **Before the end of an employee's probationary period**, usually six months for classified positions and one year for professional positions.

**Note:** A written performance assessment is required every six months during a represented professional employee's probationary period.

- **At least annually after the probationary period ends.**

**Note:** For represented employees the annual assessment must be done on the anniversary of the employee's date of hire.

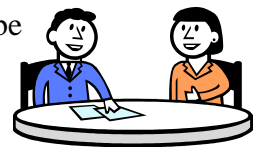
It is also appropriate and useful to conduct more frequent written assessments when an employee's performance in some areas is unsatisfactory or needs improvement.



The purpose of an **interim assessment** – which may be done at three-month, six-month, or other intervals – is to provide the employee with clear feedback necessary to improve performance and to document whether performance is improving.

The written performance assessment should **always be accompanied by a one-on-one meeting** with the employee.

**Note:** Two UMS collective bargaining agreement (ACSUM/COLT and UMPSA) specifically state that if a supervisor doesn't do a performance assessment within 30 days of its due date, the employee's performance is assumed to be satisfactory; the employee can ask Human Resources to put a satisfactory assessment statement in the personnel file. But don't let the assessment default to satisfactory. An employee whose performance is satisfactory or better deserves a thorough review and a chance to participate in assessment and goal-setting. An employee whose performance is not satisfactory needs to know which areas need improvement.



*Remember: Although the written assessment may be done only once a year, it is part of an ongoing cycle of Performance Management by the supervisor that occurs throughout the year.*