THE UNIVERSITY OF ALABAMA®
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Performance Management Update for Supervisors

Fall, 2022
Overview

Revision of the Annual Review form and process for the 2022/2023 performance year
Revision of Annual Review form

• Job Duties section
  • Enhances the focus on job responsibilities
  • Supports objective 4.3 of goal #4 in UA’s updated strategic plan to “Develop robust continual performance evaluation practices for all employees, tied to job responsibilities for each employee”
  • Job duties taken directly from the position description will be rated
  • Rating will count for 80% of overall rating
To Update Job Duties in the Position Description, if needed

1. Updates made in the UA Recruitment portal at jobs.ua.edu/hr

2. Select Job Duties Update ONLY for Type of action requested

POSITION DESCRIPTION INFORMATION

To edit an approved Position Description scroll to the bottom of the form and press "Update PD"
Click "OK" in the pop-up window that appears to reset the approval process

POSITION DETAILS

Type of action requested:

Explanation of the Request (Please provide a detailed explanation of what has changed for this position and department. Any changes to department background checks should be included here):*

Employee Classification:
To Update Job Duties in the Position Description, if needed

3. Follow the Job Duty Section Instructions
   • For Job Duties, provide 3 – 5 groupings of action statements that accurately describe the major/key responsibilities or functions of the job.
   • Identify if the duty is Essential or Marginal.
   • Allocate a percentage next to each duty.
   • Do not break duties down to less than 5%.
   • Duties submitted must total 100%.

4. Add your assigned Talent Acquisition Specialist (or HR Business Partner, if applicable) as the sole approver

5. Submit update to job duties no later than January 31, 2023
Revision of Annual Review form

• Behavioral Expectations section
  • 6 Behavioral Expectations will be rated
    • Accountability/Dependability
    • Collaboration
    • Continuous Improvement
    • Effective Communication
    • Ethics/Integrity
    • Service Excellence
  • Rating will count for 20% of overall rating
## Revision of Annual Review form

<table>
<thead>
<tr>
<th>Rating</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Consistently Exceeds Expectations</strong></td>
<td>Performance consistently exceeds expectations for job duties and responsibilities and achievement of goals/objectives and/or behaviors. Minimal guidance and supervision are needed.</td>
</tr>
<tr>
<td><strong>Partially Exceeds Expectations</strong></td>
<td>Performance exceeds some, but not all expectations for job duties and responsibilities, and achievement of goals/objectives and/or behaviors. Limited guidance and supervision are needed.</td>
</tr>
<tr>
<td><strong>Meets Expectations</strong></td>
<td>Performance consistently meets expectations for job duties and responsibilities, and achievement of goals/objectives and/or behaviors. Normal guidance and supervision are required.</td>
</tr>
<tr>
<td><strong>Partially Meets Expectations</strong></td>
<td>Performance meets some, but not all expectations for job duties and responsibilities, and achievement of goals/objectives and/or behaviors. NOTE: A Performance Improvement Plan may be required.</td>
</tr>
<tr>
<td><strong>Does Not Meet Expectations</strong></td>
<td>Performance is unacceptable and does not clearly and consistently meet minimum expectations. Does not consistently perform job duties and responsibilities and does not achieve or inconsistently achieves goals/objectives and/or behaviors. NOTE: A Performance Improvement Plan (PIP) and consultation with Human Resources are required. Immediate improvement, under the Performance Improvement Plan, is required to maintain employment.</td>
</tr>
</tbody>
</table>
Revision of Annual Review form

- The revised form will still include a section for:
  - Goals
  - Employee Feedback
- New online system
- New deadline of May 15 for completion of the annual review
Behavioral Expectations

Benefits
Provides all staff with a consistent message regarding the expectations on how to perform their job.

Uses
• Hiring process
• Feedback
• Coaching for improvement
• Annual review process
Behavioral Expectations

Accountability/Dependability
Achieves the right results in the necessary timeframe using work time and resources efficiently and effectively to manage the workload. Takes responsibility and ownership for own decisions, actions, and results.

Collaboration
Creates and maintains effective relationships with others to achieve outcomes which are beneficial to the organization.

Continuous Improvement
Actively participates in an ongoing effort for self-growth and to improve various elements in the organization.
Behavioral Expectations

Effective Communication
Conveys ideas, thoughts, knowledge, data, and other information to individuals and groups utilizing active listening skills so that the message is received and understood with clarity and purpose.

Ethics/Integrity
Performs job duties/ responsibilities in a manner consistent with UA’s values and principles. Sets an example by consistently modeling high standards of performance, fairness, honesty, inclusivity, and truthfulness.

Service Excellence
Displays a positive, professional presence as a representative of the University while providing service excellence.
Behavioral Indicators

Behavioral indicators are examples of behaviors which an employee has successfully demonstrated and are needed to accomplish their job responsibilities and the mission of the department and University at a high level of performance.

Ethics/Integrity: Performs job duties/responsibilities in a manner consistent with UA's values, policies, and Standards of Behavior. Sets an example by consistently modeling high standards of performance, fairness, honesty, inclusivity, and truthfulness.

Examples include:

- Shows respect for the rights, differences, and dignity of others
- Promotes and treats others fairly, with respect and without prejudice or bias
- Accepts responsibility for own actions and conduct in the workplace.
- Keeps promises and fulfills commitment to job expectations on a daily basis.
Next Steps

Human Resources
- Implement a communication campaign about these changes
- Update HR website with information and resources
- Work with OIT on system to be used for annual review
- Offer training for supervisors on effectively managing performance to include conducting annual reviews

Supervisors
- Kick Start the conversation with staff about upcoming changes:
  - Revised annual review format with enhanced focus on job duties
  - Behavioral Expectations and Indicators
  - New review form to be used for the 22/23 review year
- Update position descriptions, if needed, by January 31, 2023
- Attend Performance Management training