

PROBATIONARY MANAGEMENT EMPLOYEE EVALUATIONS-Policy No. G017

Recommended for Approval By Richard E. Morley, Vice President for Financial Operations and Administration

Approved By Foster F. Diebold, President January 23, 1996

Review Date: As Required

INTENT

To ensure: 1)that a probationary management employee is aware of the probationary period and is provided a formal documented performance evaluation prior to the completion of the probationary period; 2)that the supervisor of a probationary management employee and executive management are aware of the probationary period and the procedure for completion of the probationary performance evaluation.

POLICY

Each probationary management employee will receive a formal performance evaluation by the employee's supervisor prior to completion of the probationary period.

PROCEDURES

1. A minimum probationary period of six months will be established for all newly appointed or promoted management employees in accordance with the Management Compensation Plan.
2. A probationary management employee will be notified of the probationary period during the appointment process.
3. The supervisor will meet with the probationary management employee to clarify the job description, set goals, objectives, performance standards and give guidance on job requirements and expectations for successfully performing the duties of the position within one week of appointment. In addition, the supervisor will formalize and complete the job description, previously reviewed by Human Resources and Social Equity Office for classification, and forward it to that office.
4. The Human Resources and Social Equity Office should be made aware of any substandard performance during the probationary period, which may lead to a recommendation of an extension of the probationary period or dismissal. In addition, the Human Resources and Social Equity Office should be copied on all correspondence and evaluations relating to substandard performance of a probationary management employee.

5. The supervisor of a probationary management employee should conduct informal counseling sessions with the probationary employee to discuss job performance, fulfillment of expectations, etc., and to give guidance of how to improve performance as appropriate; however, lack of informal counseling sessions shall not in any way impair or prohibit the issuance of discipline (including discharge) to any employee.
6. The supervisor, at least two weeks prior to the end of the probationary period, will conduct a formal counseling session with the probationary employee and complete the Edinboro University Performance Evaluation Form (enclosed) and make a recommendation for continued employment, extension of the probationary period or dismissal as appropriate.
7. The supervisor will forward the completed evaluation to the Vice President for review and final approval of the completed evaluation. Recommendations for extension of the probationary period or dismissal will be forwarded with a recommendation from the Vice President to the President for final action.
8. The President is the sole authority for an extension of probation or dismissal.

RESPONSIBILITIES

1. Human Resources and Social Equity

- a. Include the dates of the probationary period in the appointment letter detailing the specifics of appointment and provide copies of this letter to the supervisor and Vice President.
- b. Develop and maintain the Edinboro University Performance Evaluation Form and provide copies to the University as necessary.
- c. Serve as a resource center for the University providing guidance on the conduct of informal and formal counseling sessions and the completion of the evaluation form.
- d. Send to the supervisor, at least one month prior to the end of the probationary period, a written notification of the end of the probationary period with instructions for completion of the performance evaluation.
- e. Provide guidance to the supervisor and Vice President on potential adverse personnel actions resulting from substandard performance by the probationary employee.
- f. Retain all completed evaluations and associated personnel action documents in the Personnel File of the employee.

2. Supervisor

- a. Within one week of appointment, meet with the probationary management employee and clarify the job description, set goals, objectives, performance standards and give guidance on job requirements and expectations for successfully performing the duties of the position.
- b. Formalize and complete the job description and forward it to the Human Resources and Social Equity Office within two weeks of appointment.
- c. Conduct, at the discretion of the supervisor, informal counseling sessions with the probationary employee, preferably monthly, to discuss job performance, fulfillment of expectations, etc., and to give guidance of how to improve performance as appropriate.

- d. Prior to the end of the probationary period, conduct a formal evaluation session with the probationary employee and complete the Edinboro University Performance Evaluation Form making a recommendation for continued employment, extension of the probationary period or dismissal.
- e. Forward the completed evaluation to the Vice President for review.

3. Vice President

- a. Review the evaluation submitted by the supervisor. Any discrepancy between the evaluation submitted by the supervisor and the perceptions of the Vice President will be resolved by the Vice President.
- b. Determine the appropriateness of a recommendation for continued employment and, if approved, forward the completed evaluation to the Human Resources and Social Equity Office.
- c. Investigate an overall evaluation of "Needs Improvement" or "Unsatisfactory" and determine whether to recommend extension of the probationary period or dismissal.
- d. Forward a recommendation for extension of the probationary period or dismissal to the President for final action and send a copy the correspondence and the evaluation to the Human Resources and Social Equity Office.

4. President

- a. Make a final determination on a recommendation for extension of a probationary period or dismissal.
- b. Inform the Vice President and the Human Resources and Social Equity Office of the final determination providing guidance for administrative processing as necessary.

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