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## **AUHR 9.02 PERFORMANCE MANAGEMENT**

### **Overview of Performance Management**

The performance management process is a tool used to manage performance by promoting employee understanding of successful job performance and commitment to the objectives and goals critical to the success of the Auditor's Office.

Written Performance Evaluation and Management Plans will be done on an annual cycle, typically at the beginning of the fiscal year. Employees within the Auditor's Office may be evaluated on different annual cycles. The City Auditor or designee shall review each performance evaluation and management plan after the employee has reviewed and commented on the document.

All employees should receive at least an annual review of their performance, which will be retained in their personnel files.

### **Merit pay increases require performance evaluation**

All employees in non-represented classifications who are not employed on a casual basis shall be evaluated and eligible to be considered for a merit pay increase based on an annual performance evaluation and management plan. Merit increases must be awarded in the fiscal year in which they are earned. This does not apply to employees returning from active military duty who otherwise would be eligible for a merit pay increase. Except in exceptional circumstances, such as the employee has been on an extended leave of absence, and as approved by the City Auditor, retroactive merit increases for prior fiscal years shall not be awarded. To accommodate employees whose anniversary dates are in June, merit increases for these employees must be awarded no later than August 31 following the close of the fiscal year ending June 30.

### **Amount of Merit Pay Increases**

Unless otherwise provided by these rules, non-represented employees are eligible annually on their anniversary date for a merit pay increase of up to 4.1% or to the top of the range for their classification, whichever is less.

## **Auditor's Office Performance Plans**

The Auditor's Office Performance Evaluation and Management Plan shall include the following plan requirements:

1. Consistent annual performance management evaluation period for all employees covered by the plan.
2. A performance rating schedule, which identifies the performance, pay increase, if any, given for each rating category.
3. A description of the cycle or cycles applicable to the office.
4. A written performance evaluation and management plan for each employee that is developed and communicated to the employee at the beginning of each plan year and includes:
  - a. identification of their job performance expectations and performance measures that are results-based or behavior-based or a combination of both;
  - b. An individual employee development plan;
  - c. Provisions for ongoing review during the plan year to discuss employee performance, monitor progress, modify, and update the performance plan as needed.

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## **Human Resources Rule Information and History**

Questions about this administrative rule may be directed to the [Management Services Division](#) of the Auditor's Office.

Adopted by the City Auditor December 11, 2017.

Adapted from City of Portland Human Resources Administrative Rule 9.02 Performance Management.

Adopted by Council March 6, 2002, Ordinance No. 176302.

Last revised April 25, 2016.