

4 February 2020

## Development discussions and performance evaluations 2020

The development discussions are carried out with everyone during spring 2020. Performance is evaluated during spring 2020 only for those, whose requirement level is evaluated (new/changed/employee demands) or whose performance percentage the line manager is proposing to be increased. According to the Collective Agreement the performance evaluation discussion with an employee occur within 5 years from the previous evaluation or on employee's request after 2 years of previous evaluation.

**Timetable:** **Development and performance evaluation discussions are carried out in units during 11 Feb–6 May 2020 (evaluation period).** The discussions are timed so that the evaluations can be decided by the employer by 10 May 2020 meaning that the other evaluators (e.g. research unit leader, dean) have time for the evaluations before the deadline. Possible salary increases come into force 1 June 2020.

Mepco HRM replaces the SAP HR system 1 June 2010. Due to the removal of SAP HR in May any unfinished evaluation processes shall be started from the beginning in Mepco HRM. More information on the system change from [Patio bulletin](#).

Additional evaluation period for the evaluation of the performance is 1 October – 2 November 2020. Possible salary increases come into force 1 December 2020.

**Trainings:** Salary system and development discussion training is 27 February 2020 at 9.00-10.00 in Finnish and at 10.00-11.00 in English, the training is arranged via remote connection.

**Development discussions:** Development discussions begin with each unit's goal discussion, where operations, results and goals of the unit are discussed based on outcome evaluation meetings. At the same time the results of the well-being questionnaire and development target can be discussed. In the development discussions the well-being at work and development of know-how as well as the anticipation of changes in age structure and sharing of know-how are emphasized in addition to person's goals. Also the digital pedagogical skills of teaching and research as well as guidance personnel is emphasized (see [Patio bulletin](#)). The staff training supply is available in [Patio](#). The work plan for the total working time for the academic year 2020-2021 is made in the discussions, not anymore in SoleTM but in free form using the work plan outline attached to [total working time and work plan guidelines](#) and attaching it to development discussion form.

**Forms:** The **development discussion forms 2020** (now goals are set for 2020) have been created on 3 Feb 2020 for the entire staff. The **development discussion form 2019** is ready in the system for the reporting of the goals set for 2019. New jobs, who have not yet employer decision on the requirement level, are created requirement level and performance evaluation forms by 10 Feb. The employer decisions are in the system for viewing.

**Performance evaluation:** Performance category descriptions are in appendix; performance percentage is sliding between 6-50%.

Recommendations for the performance percentages for new employees:

- Starting and with no work experience 11-18 %
- With some work experience 19-22 %

The University of Oulu recommends, that the increase can be 1-6 % at a time. It is recommendable to increase performance so that the result is full percentage units, no decimals. Performance percentage cannot change with employment contract unless title

changes. Proposals for changing the performance percentage are made in the performance evaluation process during evaluation period.

**Salary changes:** Increasing requirement level or performance percentage requires always substantial change, which means with respect to performance sufficiently permanent change which is distinguishable with respect to others doing equivalent work.

The performance evaluation concerns the performance of an employee in their work and objectives. Increase requires clear improvement of results and the fulfilment of the performance category criteria. Teaching and research staff document their merits in data collection form. Line manager proposes performance percentage.

The performance percentage may also reduce. If the evaluation discussion confirms a decline in performance, which would lead to a reduction in the performance percentage, measures for improvement in work performance should be mutually agreed. A new evaluation shall be performed at the earliest opportunity and within no more than 12 months of the previous evaluation. If the new evaluation indicates that the previous performance level has not been restored, then the personal salary element shall be revised to correspond to the new evaluation (GCA 6:6.4.3 / training school 1:7.3.3.).

**Requirement level of a job is evaluated **only when****

- a) the job is new, and the requirement level has not been confirmed by the employer or
- b) there is a substantial change in the job (change may have developed gradually) after ratification of the requirement level or
- c) employee or shop steward demands evaluation.

Requirement level of a new position is evaluated within 6 months of start of employment. Line manager proposes the requirement level. Also the performance is evaluated.

If the requirement level of a job is proposed to be increased, it shall be specified how the job has changed after the previous evaluation and on what grounds the change increases the requirement level. At the same time the performance percentage shall be evaluated. The line manager makes a proposal on the requirement level as soon as possible after a request of the employee or shop steward and within 2 months from the request.

If the requirement level changes, the increase is paid from the beginning of the next month following the written proposal of the line manager, unless the employer suggests another date for the change in position.

The requirement level evaluation forms (excl. new jobs) orders the line manager from address [HR@oulu.fi](mailto:HR@oulu.fi). If the proposed level is at least OV07 in the teaching and research staff system, the [data collection form](#) shall be attached to the form.

**Requirement bonus and immediate rewards:** In addition to requirement level and performance percentage also requirement bonus is available (not for doctoral students). It is 50 % of difference of the requirement level of the employee and the next higher requirement level. It may be temporary. Proposals are made through the management of the unit to the employer (not in Certia portal). Also [immediate rewards](#) are available.

**Budgeting:** **In salary evaluation the policies of the university, the budget and the cost frame shall be considered. Units have included the cost effects of the increases in the budget for 2020. Salary cost increase of the unit may not exceed the budget without special grounds.**

More information: [General Collective Agreement](#)  
[Salary system material and guidelines](#)  
[Development discussions](#).

More information: Tanja Mikkonen, Emilia Vuoti and Heidi Huttunen and HR Managers.

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## Appendix Performance Categories

The performance categories applied shall be determined as follows:

Performance category IV (over 42-50 %) The employee's performance is excellent and clearly exceeds all position requirements and the quantitative and qualitative objectives assigned to the employee.

Performance category III (over 31 -42 %) The employee's performance satisfies all position requirements very well. The performance exceeds the quantitative and qualitative objectives assigned to the employee in some respects.

Performance category II (over 19 – 31 %) The employee's performance satisfies the requirements of the position well, and most of the objectives assigned to the employee. Performance attains a high quality standard in key fields of duty.

Performance category I (6-19 %) The employee's performance satisfies the basic position requirements and some of the objectives assigned to the employee. Some aspects of performance are nevertheless in need of improvement.