

Contribution and Recognition Audit

A management process review with evidence worksheets

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Version 0.1 | October 2026 | Research update October 19 2026

Pilot management method | No validated organizational score

October 19 contribution history extension

Add the Contribution Attribution Assessment when the audit concerns how accomplishments are described or whether an innovation's history has been preserved. Compare an employee's neutral account, a separately collected evaluator account, and authorized records at creation and adoption. Keep originating work, later improvements, maintenance, and coordination distinct. Accurate recognition of one action does not erase another, and recent improvements can legitimately receive substantial attention.

Record whether a specific corroborated action is acknowledged, omitted from an inspected relevant account, inconsistent, or unresolved. Missing access is not omission. Preserve the account's purpose and the evidence window. Do not infer appropriation from explicit individual attribution, collective language, or a discrepancy alone. The reported case in paper 3 establishes no unfair decision or compensation outcome. Published audit material must exclude names, screenshots, internal company details, and identifiable quotations. Company confidentiality requirements and appropriate permissions apply to external use.

1 Purpose and decision boundary

This audit examines whether an organization can explain how it records contributions, acknowledges shared work, and provides development opportunities. It produces process findings, evidence limitations, and corrective actions. It does not determine an employee's worth or prove discrimination from a survey or residual. No overall CVT rating, archetype label, certification, or numerical fairness threshold is authorized by this version.

Separate recognition of completed work from selection for future responsibility. A person may deserve accurate acknowledgment while another person better meets a prospective role's criteria. The audit asks whether those criteria are relevant, stated in advance, supported by evidence, and applied consistently. It also asks whether people can correct factual errors without retaliation.

The organization should use established review routes for any employment decision affected by a factual correction. CVT alone cannot authorize pay changes, promotion reversals, discipline, or legal conclusions. This method is a proposed governance practice. Its usefulness, burden, and unintended consequences require evaluation.

2 Audit charter

Worksheet A Scope and accountability

Sponsor role: _____. Independent audit lead: _____. Employee or worker representative: _____. Decision or process under review: _____. Review period: _____. Population and exclusions: _____. Stated allocation purpose: _____. Policy and criteria in force during that period: _____.

Permitted evidence and access authority: _____. Disclosure and retention plan: _____. Conflicts of interest and recusals: _____. Confidential correction route: _____. Review recipient

and decision authority: _____. Completion date: _____. Resources available for correction: _____.

The sponsor agrees that individual survey answers and developmental reflections will not enter personnel decisions. Audit participants receive an accurate privacy explanation. An independent lead adjudicates contested evidence and controls disclosure. A sponsor who cannot support these conditions should resolve them before the audit begins.

3 Sample selection

Define the sampling frame before inspecting favorable or unfavorable outcomes. A practical initial review can cover one evaluation cycle and a stratified sample of completed episodes across role families, levels, shifts, and types of work. Include maintenance, prevention, coordination, and unsuccessful projects as well as launches and sales. A convenience sample supports only a bounded process review, not a workforce prevalence estimate.

Record the selection rule, available population, sampled cases, inaccessible records, and reasons for exclusion. If the audit oversamples complaints to understand failure modes, state that choice and do not report the resulting proportion as the organization's underrecognition rate. Review opportunity decisions among eligible people, distinguishing offers, declines, deferrals, and absence of vacancies.

Use at least two reviewers for a subset of cases as a planning practice. Compare interpretations before final conclusions. Do not treat agreement as proof of truth. Where feasible, withhold names and outcomes during the first evidence review, while recording whether the work still reveals identity. Full blinding may be impossible.

4 Evidence collection

For each selected episode, gather the objective, relevant outcome evidence, documented actions, dependencies, evaluation narrative, credit statements, and authorized opportunity decision records. Identify independent sources. Multiple copies of one narrative count as one source. Avoid private messages, surveillance data, and unnecessary personal information.

Worksheet B Episode evidence record

Case ID: _____. Episode and period: _____. Outcome and relevant quality standard: _____. Contribution actions and enabling work: _____. Joint dependencies: _____. Sources and access restrictions: _____. Source independence: _____. Constraints and adverse effects: _____. Missing or conflicting evidence: _____. Reviewers and conflicts: _____.

Evidence status: corroborated action ☐ unsupported assertion ☐ conflicting accounts ☐ insufficient coverage ☐. More than one status may apply to different claims. These are workflow descriptions, not validated grades. Separate a documented action from a claim about its causal value.

5 Attribution and recognition review

Compare the evidence record with the organization's actual acknowledgment. Ask who received credit, for what action, in which medium, and at what time. Determine whether the account conflates accountability with execution or presentation with origination. Preserve legitimate managerial and coordination contributions. A technical artifact does not automatically outweigh negotiation or prevention.

Worksheet C Credit comparison

Claim in the formal record: _____. Supporting evidence: _____. Contrary or missing evidence: _____. Contributor account: _____. Evaluator explanation: _____. Relevant policy standard: _____. Proposed factual correction or unresolved question: _____. Authorized reviewer: _____. Response and date: _____.

Classify each issue as apparent correspondence, possible omission, unverified credit, or unresolved evidence. Provide reasons in prose. Do not calculate a contribution-minus-recognition score. Difference scores can obscure separate constructs and measurement problems [R14]. Statistical model residuals, if produced by a qualified research team, are prompts for scrutiny rather than findings of individual unfairness.

6 Opportunity and dependency review

Ask whether a development or promotion decision concerned past contribution, prospective role fit, continuity, available capacity, or another stated criterion. Record the employee's expressed preference where appropriate and privately obtained. Do not infer ambition from who volunteers publicly. Task-allocation research motivates examining who receives less promotable obligations [R06], without assuming that all service work is low value.

Worksheet D Opportunity record

Opportunity and eligibility rule: _____. Available places or vacancies: _____. Application, invitation, or offer date: _____. Employee preference or decline if authorized: _____. Decision and stated reason: _____. Evidence against each relevant criterion: _____. Operational dependency cited: _____. Backup capacity and transfer plan: _____. Review date and owner: _____.

If current continuity blocks access, identify a concrete plan and review date. Repeated deferral without work transfer is a process concern. If role requirements explain the decision, verify that they existed before the candidate was evaluated and were applied to comparable candidates. Current-role performance alone need not establish managerial suitability [R07].

7 Process checks

Review question	Evidence to inspect	Possible corrective action
Do criteria exist before review?	Dated policy and reviewer instructions	Publish relevant criteria and explain changes
Can enabling work enter the record?	Sample narratives and evidence fields	Add a concise enabling-work prompt
Can contributors correct facts?	Correction route and response records	Add independent review with response dates
Does operational dependence block access?	Deferral reasons and backup plans	Fund capability transfer and revisit access
Can people use different evidence formats?	Accessibility and submission options	Permit equivalent oral or written accounts
Does the process shift burden?	Workload and documentation feedback	Reduce unnecessary recording and support recipients

These questions are a review checklist, not a validated maturity scale. A checked box does not establish effective implementation. Inspect examples of actual use and ask whether the process works for people with less access or authority. Perceived procedural fairness and accurate credit are distinct matters [R08].

8 A 75 minute calibration meeting

Use a de-identified or fictional case where feasible. Allocate 10 minutes to scope and conflicts, 15 to independent evidence review, 15 to compare contribution and acknowledgment, 15 to examine alternatives, 10 to agree on factual corrections or unresolved issues, and 10 to assign actions. This is a facilitation schedule, not a demonstrated intervention dose.

Begin with evidence before revealing the final reward decision where practical. Ask each reviewer to name one fact that would change their interpretation. Explicitly test productive coordination, role matching, employee preference, missing information, and prior opportunity. Do not use the meeting to debate which archetype describes a person. Record minority interpretations and the reason for the final process finding.

9 Worked fictional case

A launch summary credits Morgan, the project owner, with delivering a new service. The episode record shows that Priya designed recovery procedures, Sam coordinated a delayed dependency, and Morgan made scope decisions and secured resources. The summary is not necessarily false, but a later review repeats it as evidence that Morgan personally designed recovery. The audit identifies a specific unsupported inference and proposes a corrected account that preserves all documented roles.

Priya also requested a development rotation that was deferred because no backup could operate a recovery procedure. The audit records this separately as an opportunity and continuity issue. It assigns a manager to arrange backup practice and set a new decision date. The case does not establish that Priya should receive a management promotion or that Morgan acted deceptively. The evidence supports narrower factual and process actions.

10 Findings and corrective action report

Worksheet E Finding record

Finding ID and process: _____. Scope and sampling limitations: _____. Evidence and source independence: _____. Stated policy or criterion: _____. Observed discrepancy: _____. Alternative explanations considered: _____. Affected process rather than employee label: _____. Confidence and unresolved evidence in words: _____.

Action: _____. Accountable owner: _____. Resources: _____. Due date: _____. Employee correction route: _____. Follow-up evidence: _____. Possible burden or harm: _____. Decision: open ☐ implemented ☐ unresolved ☐ withdrawn after new evidence ☐.

Report process findings with their limitations. Avoid a percentage called unfairness or reward capture unless a separate validated research design supports that interpretation. Counts of omissions in selected cases describe those cases. An organization-wide claim requires a suitable sample, clear denominator, reliable adjudication, and uncertainty estimates.

11 Follow-up and confidentiality

At 30 days, check whether factual corrections and named actions occurred. At 90 days, review whether people can use the correction route, whether deferred opportunities received decisions, and whether documentation burden increased. Compare like processes and record changes in role mix. A before-and-after improvement alone does not establish causal effectiveness.

Employers receive disclosure-reviewed process summaries. Restrict individual records to authorized reviewers, keep access logs, and apply the agreed retention schedule. Suppress small or identifiable groups and avoid quotations that reveal people. Explain confidentiality limits before collecting accounts. Provide an independent concerns route and pause the audit for retaliation or serious privacy concerns.

12 Audit closeout

Closeout should state what the audit established, what remains uncertain, which corrections were made, who owns unfinished actions, and when the process will be reviewed. Employees should receive an accessible explanation of relevant process changes. Preserve the distinction between an experimental framework, a documented factual correction, and any subsequent formal employment review.

References

- [R06] Babcock, L., Recalde, M. P., Vesterlund, L., & Weingart, L. (2017). Gender differences in accepting and receiving requests for tasks with low promotability. *American Economic Review*, 107(3), 714-747. <https://doi.org/10.1257/aer.20141734>
- [R07] Benson, A., Li, D., & Shue, K. (2019). Promotions and the Peter Principle. *The Quarterly Journal of Economics*, 134(4), 2085-2134. <https://doi.org/10.1093/qje/qjz022>
- [R08] Colquitt, J. A. (2001). On the dimensionality of organizational justice: A construct validation of a measure. *Journal of Applied Psychology*, 86(3), 386-400. <https://doi.org/10.1037/0021-9010.86.3.386>
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