Welcome

to the online

Performance Management Plan

(PMP) Training

PMP Training

1. PMP Introduction - PowerPoint Presentation

2. PMP Demo Training – Banner Self Service-Test

- *Personal Review Worksheet*

- *Performance Evaluation Form*

- *Development Plan*

What is the Performance Management Process?

- This is a fully electronic performance evaluation tool that may be accessed through Banner Self-Service. The PMP replaces the old performance appraisal forms.

- The PMP includes three forms:
  - Personal Review Worksheet
  - Performance Evaluation Form
  - Professional Development Plan

- The PMP is used for full-time, non-faculty employees. Full-time employees are considered to have an FTE of at least .80.

PMP Overview

- Objectives
- Timeline
- Cycle
- Online Forms (Three)
- [Performance Elements](#)
- [Performance Ratings](#)
- Weight Ranges and Assigned Weight
- Rating, Points and Final Score
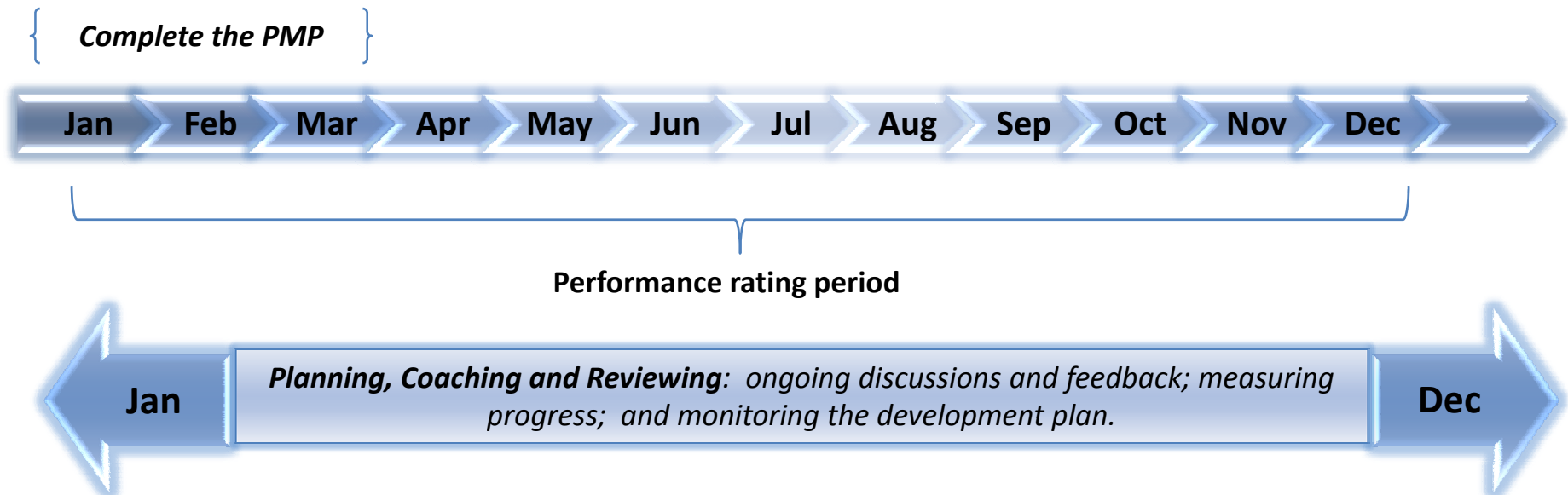- Email Notifications and PMP Steps

Objectives

- Demonstrate the University's commitment to each employee's success
- Identify employee strengths and areas that need improvement
- Provide feedback to employees on their overall job performance
- Align individual goals with the University's mission, vision and strategic goals
- Allow employees to take responsibility for their performance
- Assist managers and supervisors in documenting employee performance
- Clarify understanding of specific job expectations
- Place primary emphasis on employee self-development and intimately involve the individual in the planning and implementation of career objectives
- Provide a tool which enables management to assess individual strengths and development needs, relate these assessments to current and future job requirements, and make staffing and organization plans accordingly
- Link employee pay to performance

Performance Management Process Timeline

*The PMP is an on-going, twelve-month process that is encapsulated in the Performance Management Form (PMF). The PMF should be completed between January 1st and March 31st of each year so that wage reviews may coincide with the beginning of the University's budget cycle. (**This year transition period, the PMF should be completed between June and August 31, 2009).***

Complete the PMP

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Performance rating period

Jan | *Planning, Coaching and Reviewing: ongoing discussions and feedback; measuring progress; and monitoring the development plan.* | **Dec**

PMP Cycle

Planning – "Performance Expectations"
- Job description: Supervisor works with employee to establish expectations and goals (performance, capabilities and career development).

Coaching – "Feedback" and "Training"
- On-going feedback: reviewing, observing, monitoring, and documenting progress (employee's work efforts, skills and behavior).

Review/Evaluation– "Two-way discussion"
- Annual Evaluation: Employee will be rated according to the performance expectation (job accountabilities, behaviors, overall rating, and development plans); make final comments; modify accountabilities, measure the development plans/goals.

Coaching

Planning
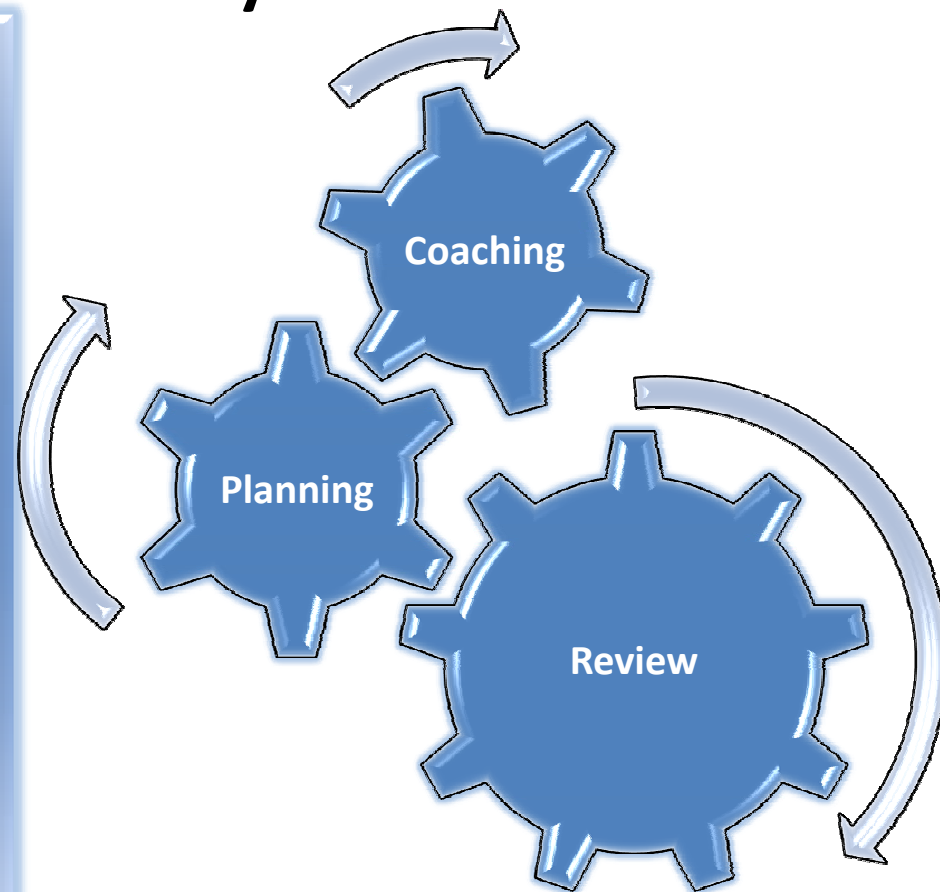
Review

PMP Forms

- Employees (supervisory and non-supervisory) should complete the ***Personal Review Worksheet***.

- Supervisory personnel should complete the ***Performance Evaluation Form and Development Plan***.

PMP Form

- **Personal Review Worksheet**

  – This form should be completed by both supervisory and non-supervisory personnel.

  – This is a self-assessment form which the employee uses to assess their performance during the rating period, develop goals and planned accomplishments for the next review period, and identify barriers that affect their performance.

Personal Review Worksheet - Sample

PMP Form

- **Performance Evaluation Form**
  - Supervisory Personnel
  - Evaluation Category
    - Seven (7) Performance Elements
      - Comments and Goals
    - Five (5) Ratings
    - Weight Ranges for each Performance Element
    - Assigned Weight
    - Total Points
    - Overall Final Score

Performance Evaluation Form Sample

PMP Form

- ## Development Plan
  - This form should be completed by supervisory personnel.
  - Mandatory for *final scores* of Unsatisfactory (1) and Marginal (2)
  - Three (3) statements pertaining to **specific** deficiencies or behavior; **specific** expected changes; and list of resources (professional development, training, learning activities) that will be made available to help employee improve or correct the performance deficiency.

  - This plan is optional for other scores.

Development Plan - Sample

Performance Elements

- Performance elements are attributes of job performance that an employee exhibits in performing job responsibilities. Each performance element is assigned a weight between a specified range. The weight ranges are indicated on the evaluation form.

- The seven performance elements included in the new PMP are:

  1. **Technical Knowledge and Skills Competence**
  2. **Working Relationships**
  3. **Communications**
  4. **Engagement and Accountability**
  5. **Customer Relations**
  6. **Management and Leadership**
  7. **Diversity/EEO**

Performance Rating

- The performance rating is a numerical representation of the manager's assessment of an employee's performance in each performance element. Each employee may be rated between 1 and 5 for each performance element and will also be assessed an overall performance rating based on the total final score of the performance evaluation.

- The five performance rating options are:

5. Exceptional

4. Commendable

3. Satisfactory

2. Marginal

1. Unsatisfactory

Weight Ranges and Assigned Weight

Each Performance Element in the employee's Performance Management Plan is assigned a weight between a specified range.

• The sum of the assigned weights for all of the elements in the Performance Plan must equal 100.

• As a general rule, identical positions will have similar weights assigned to each element. However, there may be exceptions. Please contact Human Resources if you have any questions.

Performance Elements	Weight Range	Assigned Weight	Rating	Total Point
Technical Knowledge and Skills Competence	15-50	20	4	80
Working Relationships	5-15	10	4	40
Communications	5-15	10	4	40
Customer Relations	15-50	20	4	80
Management and Leadership	10-50	10	3	30
Engagement and Accountability	15-50	15	3	45
Diversity/EEO	15-50	15	3	45
Overall Total Point		100%		360

Example: The employee scored 360 out of 500 points; Overall score: 3, This score is Satisfactory.

Performance Management Process – PMP Overview Steps

Email notification is sent to employees ("It is time for your Performance Evaluation for the period of Jan-Dec 2009. Please complete the evaluation between January - March")

Step 1: Employee completes the Personal Review Worksheet.

Email notification is sent to the employee's supervisor. ("The employee has completed the Personal Review Worksheet. Please complete the Performance Evaluation and Interview.")

Step 2: Supervisor completes the Performance Evaluation (PE) form.

PMP Overview Steps

Step 3: Supervisor schedules an interview with the employee. Supervisor and employee establish goals for next year. Supervisor and employee prepare the development plan, if required. Supervisor signs the Performance Evaluation.

 Email notification is sent to the employee stating that the supervisor has signed the Performance Evaluation and now it's time for the employee to sign the Performance Evaluation.

Step 4: The employee signs the Performance Evaluation.

Email notification is sent to Human Resources for employees with overall score of 1 or 2 stating that a Development Plan must be completed. Human Resources tracks the follow-up plan.
Performance evaluation final score and completion date will be posted to the employee's electronic Personnel Record.

Step 5: Supervisor and employee should have ongoing discussions/feedback about performance throughout the year.

PMP Summary

- Performance Rating Period: January 1 – December 31
- Employee/Supervisor complete the evaluation between January-March of each year. **(Transition year: between June and August 31, 2009)**
- Seven (7) Performance Elements, five (5) Performance Ratings, Weight Range & Assigned Points, Total Points, Final Score and Recommended Assigned Weights; email notifications

HR Website http://www.uah.edu/admin/HR/performancemgt.php
- Frequently Asked Questions (FAQs)
- Suggestions, Comments, & Questions - PerformanceMgmt@uah.edu
- Future enhancement to the PMP, Version 2.0
- Weekly PMP Training Sessions
- Group Training for your Department
- PMP, Introduction – Training Presentation
- Instructions and sample forms - PMP

The End
Congratulations!

You have completed the PMP Training!