

PERFORMANCE DEVELOPMENT PROCESS

Instructions for completing the PDP Form - Review Period: Begins April 1 - Ends March 31

End of Review Period - March 31:

1. Consider employee's performance during the **entire** review period. You may ask the employee to provide you with a self-evaluation and list of accomplishments prior to completing the review.
2. Using the form created last year containing the employee's objectives for the current evaluation year, evaluate performance on all applicable performance factors and operational objectives by checking the appropriate rating boxes and including comments. If no form was created last year, then begin with a blank form and first follow the instructions contained below under the section "Beginning of Review Period – April 1."
3. Evaluate overall performance and include comments in "Summary of Overall Performance."
4. Determine the overall rating by using the worksheet. Discuss the evaluation with the next level supervisor or department designee before presenting the evaluation to the employee.
5. Conduct a performance review discussion with employee. Be straightforward about any concerns and areas of necessary improvement and recognize any areas of strength or accomplishments.
6. Provide employee the option to add their comments.
7. Sign and date the form and ask the employee to sign and date the form. Explain that the employee's signature does not indicate agreement with the evaluation, but rather that the employee has had the opportunity to review the evaluation with the supervisor. Obtain final signature from Chancellor/Vice Chancellor for your unit. In lieu of a wet signature, each person may simply type their name in the appropriate blank.
8. Forward the completed PDP form to USMO-Human Resources, provide employee with a copy, and retain a copy for your files.

During Review Period and Throughout the Year:

1. Update performance factors and operational objectives as necessary; discuss revisions with the employee. Use the form as a basis for discussing performance and providing feedback and coaching during the review period.

Beginning of Review Period - April 1:

1. Complete identification information located on the top of the form.
2. Identify major performance factors applicable to the employee. Indicate those that do not apply (e.g. "supervising employees.")
3. Identify major performance factors that are key to the position by assigning them a high "weight." Assign an appropriate weight to all other factors. (Note: A "low" weighting does not mean that the factor is unimportant, only that it is less important than other factors.)
4. (Optional) Write operational objectives and standards in the blank sections labeled "Primary (and Secondary) Operational Objectives" on page 2 of the PDP form. Indicate the appropriate weight of the objective in the space provided.
5. Discuss with the employee the weights assigned to each performance factor and the employee's goals and objectives for the coming year. Sign and date the top of the form. **Retain the individualized PDP form** to complete at the end of review period the following year and provide a copy to the employee. Please forward a copy of the first page to USMO-Human Resources.