PERFORMANCE PLANNING AND EVALUATION SCHEDULE

Timeline:
March 31 – Performance Year ends.
April 1-12 – Performance EVALUATION Due in Human Resources
April 30 – Updated Performance PLAN Due for the upcoming evaluation period.
May 1-10 – Performance PLAN Due in Human Resources (30 days after evaluation submitted)
October 1-10 – Midyear performance REVIEW due in Human Resources

Upon transfer or promotion of employee to different department – Interim evaluation due in Human Resources
30 days after hire – New employee’s performance plan due in Human Resources
60-90 days after hire – Interim Evaluation for new hire due in Human Resources
6 months after promotion (OR) transfer – Midyear progress review due in Human Resources

Performance Plan Instructions

A performance plan for the upcoming evaluation year (April 1 – March 31) must be submitted to the HR office within 30 days after the evaluation due date (March 31).

A performance plan should outline the duties/tasks, responsibilities, expected behaviors, goals, and objective measurements for each job. Your plan links what you do to the rest of the department and to the organization.

Sit down with your employee and complete the performance plan as follows:

1. Fill out Section I. Identification Section. The position number and classification will be on your copy of the Position Description Questionnaire (PDQ).
2. Fill out Section III. Capsule Job Description. This can be found in Item II, Page 1 of the PDQ.
3. Fill out Section IV. Uniform Core Competencies. Give each factor a weight on the left hand side. Put in Behavior Indicators, such as “Listens and responds to others appropriately”, or “provides accurate and timely information.” Make any comments necessary to address the unique position the employee is filling. Continue for each of the factors.
4. Fill out Section V. Individual Performance Objectives (IPOs). Agree on goals/objectives for the employee that are unique and attainable for that position that you both would like to see accomplished in the remaining evaluation period. Give each goal/objective a weight. The combined Uniform Core Competencies and IPOs should add up to a total of 100%.
5. After discussion, clarification and agreement between the two of you, please complete the “Performance Planning” portion of Section II. Agenda. Both the supervisor and the employee must sign and date as indicated.
6. Make a copy of the performance plan and return the original, signed copy to the Human Resources office.
7. Both you and the new employee may review and revise the performance plan throughout the year. At least one midyear review must be completed with all employees.

**MIDYEAR PROGRESS REVIEW**

The midyear review is due October 1. Use the Performance Plan/Evaluation form that Human Resources will return to you. Compare and discuss with employee their performance to factors and goals/objectives on the performance plan. Feedback should be given to employee to enable the employee to attain or exceed goals/objectives. Goals/objectives can also be revised to adjust for changing departmental objectives.

After discussion, clarification and agreement between the two of you, please complete the “Performance Progress Review” portion of Section II. Agenda. Both the supervisor and the employee must sign and date as indicated. Return the document to the Human Resources office.

**PERFORMANCE EVALUATION**

The performance evaluation year ends on March 31. The evaluation is due in the Human Resources office by April 12.

1. Both the supervisor and the employee should review the Performance Plan/Evaluation form that Human Resources will return to you.
2. At least five (5) days prior to the evaluation discussion, the employee should receive the Employee Self-Review Worksheet. It should then be completed and submitted to his/her supervisor at least two days prior to the evaluation discussion.
3. Each of the factors and the goals/objectives should be rated in the appropriate boxes.
4. Transfer the weight numbers to Section VI. Quantification in the appropriate column.
5. Give each rating a number value and put in the appropriate columns.
6. Multiply the weight by the rating and put the score in the Score column.
7. Add up the scores and put the total in the total box.
8. Convert the numerical score to the descriptive rating.
9. If the final rating is either “Consistently Exceeds Expectations” (4) or “Unsatisfactory Performance” (1), the “Justification” box (above the “Quantification” section) must be completed.
10. Check the appropriate rating box.
11. The supervisor and the employee must then meet and discuss the evaluation. If both agree with the evaluation, the document must be signed by both the supervisor and employee as indicated. Please copy and submit the original to the Human Resources Office by April 10.