

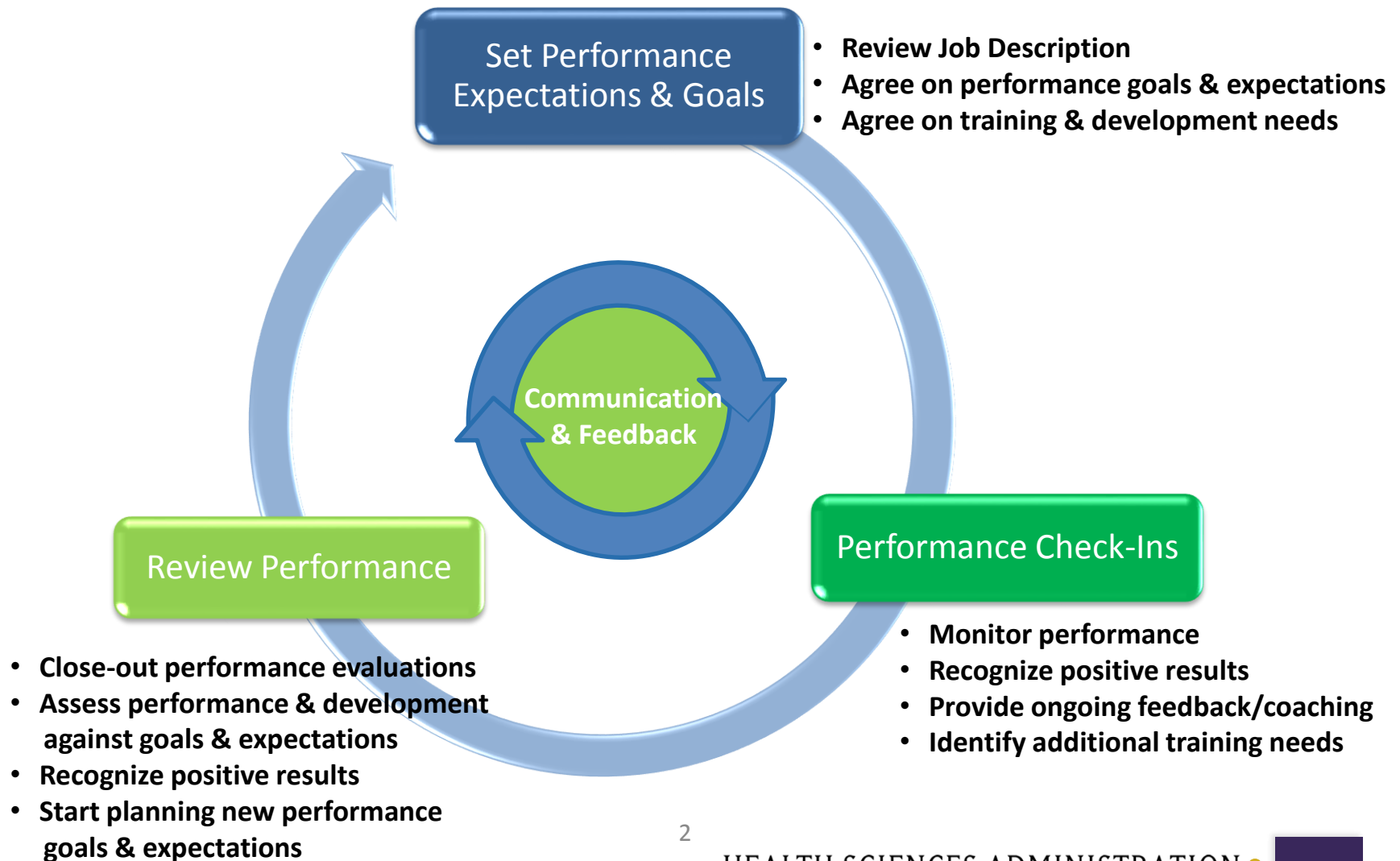
# Performance Development Plan

HSA

Performance Management Program

2015

# Performance Management Cycle




# New PDP Process

## What's the point?

- It's required
- Feedback
- Better metrics
- Supervisor/employee may not know everything

## Simplified and standardized

- Doing what you're supposed to do – it's a plan
- Emphasis on ongoing communication, clarity
- Cultural shift - expecting high performance

 <b>UNIVERSITY of WASHINGTON</b> HEALTH SCIENCES ADMINISTRATION			<b>PERFORMANCE DEVELOPMENT PLAN</b>		Institution / Department HSA Unit: <input type="text"/>
<b>Employee Name</b> <input type="text"/>	<b>Classification Title</b> <input type="text"/>	<b>Evaluation Period</b> FROM <b>1/01/2014</b> TO <b>6/01/2014</b>	<b>Evaluation Date</b> <input type="text"/>		
<b>ORGANIZATIONAL IMPACT &gt;</b>		<i>How does this position contribute to the stated mission and goals of the relevant HSA Unit?</i> <input type="text"/>	<i>How does this position contribute to the UW mission?</i> <input type="text"/>		
<b>PERFORMANCE FACTORS</b>		<b>Performance Expectations</b>	<b>Examples and Comments</b>	<b>RATING</b>	
<b>Quality of work</b> Competence, accuracy, thoroughness, across service profile.		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	
<b>Quantity of work</b> Use of time, volume of work accomplished, ability to meet schedules, efficiency and productivity levels.		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	
<b>Job knowledge</b> Degree of technical knowledge, understanding of job procedures, method and best practices.		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	
<b>Working relationships/Service</b> Communication, cooperation and ability to work with supervisor, colleagues, co-workers, students and clients served.		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	
<b>Leadership and/or Supervisory skills</b> Leadership skills across activity scope. Training, directing and/or evaluating subordinates and/or teams, delegation, planning/organizing work, problem solving, decision-making ability, judgment, communicates effectively.		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	
<b>Alignment and progress with Unit Mission, Values, Strategies</b> <input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Exceeds expectations*	
				<input type="checkbox"/> Meets expectations	
				<input type="checkbox"/> Needs improvement*	

\*Provide specific examples of this employee's performance

**DEFINITIONS OF PERFORMANCE RATING CATEGORIES**

**Exceeds Expectations\*** – The employee regularly works beyond a majority of the performance expectations of this factor and has made many significant contributions to the efficiency and economy of this organization through such performance

**Meets Expectations** – The employee has met the performance expectations for this factor and has contributed to the efficiency and economy of this organization.

**Needs Improvement\*** – The employee has failed to meet one or more of the significant performance expectations for this factor.



Employee Name [REDACTED]	Classification Title [REDACTED]	Evaluation Period FROM 1/01/2014 TO 6/01/2014	Evaluation Date [REDACTED]
1. SPECIFIC ACHIEVEMENTS (Attach additional sheets if necessary) [REDACTED]			
2. PERFORMANCE GOALS FOR THE NEXT EVALUATION PERIOD [REDACTED]			
3. TRAINING AND DEVELOPMENT SUGGESTIONS [REDACTED]			
4. ATTENDANCE (Supervisor's Comments) [REDACTED]			
RATER'S NAME (Supervisor or primary evaluator) [REDACTED]	RATER'S TITLE [REDACTED]	RATER'S SIGNATURE [REDACTED]	DATE RATED [REDACTED]
EMPLOYEE'S COMMENTS - [REDACTED]			
This performance evaluation was discussed with me on the date noted above. I understand that my signature attests only that a personal interview was held with me; it does not necessarily indicate that I agree with the evaluation.		EMPLOYEE'S SIGNATURE [REDACTED]	DATE SIGNED [REDACTED]
SECONDARY REVIEWER'S SECTION (where bargaining unit, HSA unit or department policy requires a secondary review of rater's evaluation)			
Reviewer's Comments:  			
REVIEWER'S NAME (Print or Type) [REDACTED]	REVIEWER'S TITLE [REDACTED]	REVIEWER'S SIGNATURE [REDACTED]	DATE REVIEWED [REDACTED]

• A copy of the signed evaluation will be provided to the employee upon request.

Revised 4/25/2014

# PDP Process Steps

1. **Unit PDP practices communicated**
2. Supervisor establishes PDP schedule for team
3. Supervisor develops PDP form
4. Employee self-evaluates
5. Supervisor provides employee with draft PDP
6. Employee and supervisor meet to review
  - Goals, expectations
  - Current performance ratings
  - Discuss and further develop plan for next performance period
7. Finalize PDP, sign – next steps

# PDP Meeting Protocol

**Be prepared - docs and ducks in a row**

**Be honest - work together**

**Supervisors *guide* a conversation, not control a discussion**

**Identify and discuss what...**

- Supervisor will do to help the plan succeed
- Employee needs from the supervisor

**Next steps**

- Incorporate new information
- Develop a plan to address
  - Resources – time, money
  - Employee needs and team equity
  - Alignment

# 3 Point Rating Scale

## Meets Expectations

Performance fully meets job requirements and expectations on a consistent basis. Performs tasks/functions and meets performance factors:

- performs and sustains the function at a *high quality* level
- in alignment with strategic goals
- initiates and/or volunteers
- consistent, thorough, timely



## Exceeds Expectations

Performance consistently exceeds requirements, reaching a very high level found only in a small percentage of people; with minimum supervision or directions, achievements are well beyond those expected at this level. Has a unique, positive, and outstanding impact on the organization.



*Qualifies for recognition, reward and active measures to retain and/or advance this employee*

## Needs Improvement

Performance sometimes meets requirements, but not consistently; improvement necessary. Unsatisfactory; consistently failed to meet the performance expectations for this factor(s)



*Qualifies for immediate follow-through, feedback, coaching, possible corrective action; supervisor provides timely, specific documentation and appropriate planning*