



PERFORMANCE MANAGEMENT PROCESS

Glossary of Terms

Term	Definition/Example
Assessing	Third and final phase (follows Planning and Coaching) of the Performance Management Process. Assessing includes: Interim Assessment (January), Self Assessment, Supervisor Assessment (written and verbal), and ratings.
Assessment – Mid-year	Supervisors and staff members meeting January-February to discuss achievement of Performance Goals, Professional Growth and Career Management Goals, and use of Competencies between Planning and Goal Setting and Mid-Year Assessment meetings.
Assessments - Supervisor	Written during the May-June timeframe, supervisors are responsible for completing a written assessment on each staff member who directly reports to them. Assessments include examples of work accomplished to achieve goals, and how competencies were used to achieve goals. Supervisors and staff members have the assessment discussion following the completion of the written Self and Supervisor assessments (utilizes HHR Performance Management Form).
Assessments - Self	Written by staff members during the month of May using the Performance Management Form (provided during the Planning phase). Opportunity for staff members to reflect and think about their achievement of goals, use of competencies, and how accomplishments support unit/department mission and goals.
Coaching	Second and ongoing part of the Performance Management Process that builds on the planning phase; critical part of a supervisor’s role. Coaching is defined as, “An ongoing conversation between a supervisor and a staff member, which focuses on using and improving an individual’s skills, knowledge, and abilities to achieve goals.” Coaching as a technique is inquisitive and uses open-ended questions, i.e., What did you do well? What would you do differently the next time? What are the most difficult problems that you are facing so far? What are some ways to overcome them? How can I support you as your supervisor?
Competencies	Used to achieve goals as part of performing job responsibilities. Competencies represent the “how” the work is done in support of achieving goals.
Feedback	Occurs on a continuing basis between supervisors and staff members. During conversations, feedback focuses on behavior(s) that have positive and/or negative impact on accomplishments. Utilizes the “Behavior + Impact (+Alternative Positive Behavior)” technique. Examples: (1) <u>Positive behavior</u> : “Harry, you’re doing a great job managing the staff. You make sure that everyone knows what’s going on in HHR, and talk with staff members about what’s going well and what needs to improve. That helps all of us to stay on track.” (2) <u>Negative Behavior</u> : “Betty, we recently changed our supply ordering procedures. I notice that you continue to work the old way, and that’s inconsistent with what is now needed. This hinders our ordering and ability to know what is on hand should a need arise. Moving forward, we need you to adhere to the new procedures.”

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Goals	Goals are a “roadmap” describing “what” is to be achieved/accomplished (results) during a period of time. Goals are dynamic in nature and may shift during the year to support unit/department mission and goals.												
Planning	First phase of the Performance Management Process. Includes the determination of unit-wide goals, department and individual goals, and Competencies; written utilizing “SMART” principles (see definition below).												
Performance Management	A collaborative communication process that supports a positive working relationship between supervisors and staff. Consists of three phases: Planning, Coaching, and Assessing.												
Rating Scale and Definitions	<p>A rating scale is used when completing self and supervisor assessments. The rating selected indicates how well the individual goal has been achieved and competencies have been demonstrated, as well as an overall rating. Central Administration PMP rating scale is as follows:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center; background-color: #e0e0e0;">Rating Scale with Definitions</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; vertical-align: top;">5 Leading Performance</td> <td>This rating is reserved for those few individuals whose performance consistently exceeds the job requirements as measured by productivity, efficiency, quality, timeliness, and working with others to meet the overall objectives of the unit. Is recognized as a role model in their position. This individual has mastered the behaviors, knowledge, skills and experience required for this role and is ready for an expanded role. This rating is reserved for employees in their role for at least a year and it is unlikely that an employee receive this rating two years in a row</td> </tr> <tr> <td style="text-align: center; vertical-align: top;">4 Strong Performance</td> <td>Consistently meets and occasionally exceeds expectations. Exhibits strong performance and a high degree of effectiveness. Takes personal ownership and works collaboratively to solve problems. Demonstrates high levels of energy, effort, effectiveness and judgment with limited supervision.</td> </tr> <tr> <td style="text-align: center; vertical-align: top;">3 Proficient Performance</td> <td>Consistently meets expectations. Performance is reflective of a fully qualified and experienced person in the position. Prioritizes work effectively and gets the job done. Works toward the overall objective of the team. Takes ownership of job goals and worked collaboratively to substantially achieve them. Demonstrates commitment, good judgment and teamwork.</td> </tr> <tr> <td style="text-align: center; vertical-align: top;">2 Building Performance</td> <td>Gaining proficiency; Achieves some position goals and responsibilities, but does not yet perform consistently in all work situations. Must perform more consistently and acquire necessary knowledge and skills. This rating may be for employees who are new to their role (6mos-a year). If employee is not new to their role, this rating may require a performance improvement plan.</td> </tr> <tr> <td style="text-align: center; vertical-align: top;">1 Needs Immediate Improvement</td> <td>Lacking proficiency in performance. Goals have not been accomplished; knowledge, skills, and abilities have not been demonstrated at appropriate levels. Lack of improvement in the quality or consistency of performance. The overall rating requires a performance improvement plan.</td> </tr> </tbody> </table>	Rating Scale with Definitions		5 Leading Performance	This rating is reserved for those few individuals whose performance consistently exceeds the job requirements as measured by productivity, efficiency, quality, timeliness, and working with others to meet the overall objectives of the unit. Is recognized as a role model in their position. This individual has mastered the behaviors, knowledge, skills and experience required for this role and is ready for an expanded role. This rating is reserved for employees in their role for at least a year and it is unlikely that an employee receive this rating two years in a row	4 Strong Performance	Consistently meets and occasionally exceeds expectations. Exhibits strong performance and a high degree of effectiveness. Takes personal ownership and works collaboratively to solve problems. Demonstrates high levels of energy, effort, effectiveness and judgment with limited supervision.	3 Proficient Performance	Consistently meets expectations. Performance is reflective of a fully qualified and experienced person in the position. Prioritizes work effectively and gets the job done. Works toward the overall objective of the team. Takes ownership of job goals and worked collaboratively to substantially achieve them. Demonstrates commitment, good judgment and teamwork.	2 Building Performance	Gaining proficiency; Achieves some position goals and responsibilities, but does not yet perform consistently in all work situations. Must perform more consistently and acquire necessary knowledge and skills. This rating may be for employees who are new to their role (6mos-a year). If employee is not new to their role, this rating may require a performance improvement plan.	1 Needs Immediate Improvement	Lacking proficiency in performance. Goals have not been accomplished; knowledge, skills, and abilities have not been demonstrated at appropriate levels. Lack of improvement in the quality or consistency of performance. The overall rating requires a performance improvement plan.
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“SMART” Principles	Guidelines and elements to be considered when writing “SMART” goals. “SMART” stands for: Specific, Measurable, Aligned, Realistic, and Time bound . See SMART goals examples and action verbs for more information.												

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Track Progress	Individually, supervisors and staff members maintain paper and/or electronic files on accomplishments and feedback received, i.e., emails from colleagues, clients, and others regarding the staff member.
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