

**PERFORMANCE MANAGEMENT PROCESS  
PMP FORM**



EMPLOYEE NAME	ID #	PERIOD COVERED	DATE OF REVIEW
JOB TITLE	DIV./DEPT.	SECTION/UNIT	SUPERVISOR

**INSTRUCTIONS FOR COMPLETING PMP FORM:**

**Beginning of Review Period**

1. Complete identification information above.
2. Identify major performance areas applicable for employee (Section 1). Sign and date form after discussing factors/objectives.
3. Identify the performance factors which are key to the position (Sections 2 and 3) by indicating the importance weighting (High, Medium, Low). These will be the factors on which the employee will be evaluated. (Note: A "Low" weighting does not mean the factor is unimportant, only that it is less important than other factors.)
4. (Optional) Write operational objectives and standards (Section 4) and indicate importance weighting.
5. Employee and supervisor retain copy of PMP form.

**During Review Period**

1. Update performance factors and operational objectives as necessary, and use form as basis for discussing performance and providing feedback and coaching.

**End of Review Period**

1. Evaluate performance on key performance factors and operational objectives (if applicable), and document performance under "Comments" or "Results." Consider performance during entire period.
2. Evaluate overall performance (Section 5) and note any overall comments on performance.
3. Discuss evaluation with next level supervisor or department designee.
4. Conduct performance review discussion and complete development plans (Section 6).
5. (Optional) Employee may add his/her comments (Section 7).
6. Sign and date form (Section 8).
7. Forward original signed form to Office of Human Resources Management.

**RATING SCALE:**

- OUTSTANDING:** Performance consistently above standards and far exceeds normal expectations; exceptional achievement and contribution to institution.
- ABOVE STANDARDS:** Performance above standards in many important aspects and exceeds normal expectations.
- MEETS STANDARDS:** Performance meets standards in all important aspects.
- BELOW STANDARDS:** Performance below standards in some important aspects, but meets standards in other aspects; improvement needed.
- UNSATISFACTORY:** Performance below standards in critical aspects; improvement required.

## SECTION 1: MAJOR PERFORMANCE AREAS

Check major performance areas applicable for employee:

- Individual Performance Factors (Section 2)
- Manager/Supervisor Performance Factors (Section 3 -- used only if employee is responsible for supervising others)
- Operational Objectives (Section 4 -- optional)

Signatures below indicate performance factors and objectives have been identified and discussed with employee:

Employee: \_\_\_\_\_ Date: \_\_\_\_\_  
 Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

## SECTION 2: INDIVIDUAL PERFORMANCE FACTORS

BASIC WORK FACTORS	Impt Wgt: High Med Low	RATING SCALE				
		OUT- STAND- ING	ABOVE STAND- ARDS	MEETS STAND- ARDS	BELOW STAND- ARDS	UNSAT- ISFAC- TORY
<b>QUALITY OF WORK:</b> Completing work thoroughly, accurately, neatly and according to specifications; producing output with minimal errors		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>QUANTITY OF WORK:</b> Consistently producing a high volume of acceptable work; producing services or output quickly and efficiently		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TIMELINESS:</b> Completing tasks and assignments by scheduled time; allocating time to various tasks and assignments in accordance with priorities; informing supervisor when schedule problems occur		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>USE OF RESOURCES:</b> Making good use of resources, and not wasting time or material; looking for ways to reduce costs; staying within budgets allocated		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ATTENDANCE AND PUNCTUALITY:</b> Coming to work regularly without excessive absences; maintaining assigned work schedules		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

## COMMUNICATIONS

<b>ORAL COMMUNICATIONS:</b> Speaking clearly, concisely, and using words easily understood; exchanging ideas with others; making oral presentations at meetings; listening to understand meaning of oral material		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>WRITTEN COMMUNICATIONS:</b> Writing reports, memos, letters, etc. using appropriate style, format, spelling, and grammar; writing in a clear, concise manner		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

INTERACTING WITH OTHERS	Impt Wgt: High Med Low	RATING SCALE				
		OUT- STAND- ING	ABOVE STAND- ARDS	MEETS STAND- ARDS	BELOW STAND- ARDS	UNSAT- ISFAC- TORY
<b>COOPERATION AND TEAMWORK:</b> Putting the group's success ahead of personal goals; sharing information and resources with others; giving timely response to requests made by others; promoting teamwork.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>INTERPERSONAL RELATIONSHIPS:</b> Showing sensitivity to and concern for the interests and needs of others; working to reduce conflict and establishing smooth work relationships; negotiating with others.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>CUSTOMER SERVICE:</b> Understanding the needs of internal and external customers; making special effort to be responsive in meeting their needs and in building customer satisfaction.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>PUBLIC RELATIONS:</b> Representing the University in a positive way to members of the University community and external groups.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

### CONCEPTUAL SKILLS

<b>PLANNING:</b> Developing strategies and work plans for accomplishing goals; organizing tasks in a logical sequence and identifying resources required.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>PROBLEM SOLVING:</b> Identifying problems and analyzing causes; taking or recommending actions after evaluating alternative solutions; following up to ensure problems are actually corrected.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>CREATIVITY:</b> Discovering and implementing new and improved ways of doing things; breaking out of the "status quo" to find better ways to accomplish goals.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

### JOB SKILLS

<b>JOB KNOWLEDGE:</b> Understanding job procedures, policies and responsibilities; keeping up-to-date technically; acting as a resource person on whom others rely for assistance.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>HANDLING CHALLENGES:</b> Maintaining high performance under conditions of pressure or uncertainty; dealing with varying workload requirements; remaining composed when decisions have to be made quickly.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>INITIATIVE:</b> Anticipating problems and voluntarily taking appropriate actions; assuming responsibility for work without being told; seeking out or willingly accepting tough assignments.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ADMINISTRATION:</b> Keeping accurate records and documenting actions; processing paperwork; organizing information for follow-up and retrieval later.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

### OTHER FACTORS (OPTIONAL)

		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>COMMENTS</b>						

## SECTION 3: MANAGER/SUPERVISOR PERFORMANCE FACTORS

**EMPLOYEE NAME**

**ID #**

**Note:** Complete this Section only if employee is responsible for supervising others.

<b>PLANNING AND ORGANIZING</b>	<b>Impt Wgt: High Med Low</b>	<b>RATING SCALE</b>				
		<b>OUT- STAND- ING</b>	<b>ABOVE STAND- ARDS</b>	<b>MEETS STAND- ARDS</b>	<b>BELOW STAND- ARDS</b>	<b>UNSAT- ISFAC- TORY</b>
<b>SETTING OBJECTIVES:</b> Establishing appropriate objectives and priorities for the unit based on strategic goals of the University; communicating objectives and priorities to others; updating objectives as needed.	□	□	□	□	□	
<b>BUDGETING:</b> Developing budgets for the unit based on strategic goals to be accomplished; monitoring status during the year; recommending changes to budget when appropriate.	□	□	□	□	□	
<b>ORGANIZATION AND WORK ALLOCATION:</b> Organizing the work flow and relationships among people and functions in the unit; delegating work to make efficient use of resources and to develop peoples' capabilities.	□	□	□	□	□	
<b>COORDINATOR/INTEGRATION:</b> Interacting with others to achieve common goals; facilitating the flow of information among individuals and groups; seeking support from other functions when appropriate.	□	□	□	□	□	
<b>MONITORING GROUP RESULTS:</b> Tracking performance to ensure the unit is meeting its objectives; initiating timely action when required by internal or external change.	□	□	□	□	□	
<b>COMMENTS</b>						

### MANAGING/SUPERVISING EMPLOYEES

<b>STAFFING:</b> Planning and staffing the unit with the appropriate number and skills mix of employees; selecting highly qualified persons for the unit; using staff creatively to solve staffing shortages.	□	□	□	□	□
<b>DEFINING EXPECTATIONS:</b> Reaching agreement with employees on their objectives, priorities and measures; ensuring objectives and work plans are updated when required.	□	□	□	□	□
<b>FEEDBACK AND COACHING:</b> Providing employees with frequent performance feedback and coaching; providing recognition for areas of high or improved performance; working with people to correct performance problems.	□	□	□	□	□
<b>PERFORMANCE REVIEWS:</b> Evaluating performance and conducting performance review discussions when appropriate.	□	□	□	□	□
<b>HUMAN RESOURCES DEVELOPMENT:</b> Supporting employees in increasing their capabilities to contribute more on their present jobs and to prepare them for future jobs; identifying training needs and suggesting training programs.	□	□	□	□	□
<b>LEADERSHIP AND MOTIVATION:</b> Creating a productive, creative environment where people strive for quality of service; fostering a commitment for achieving University goals; setting an example for others to follow.	□	□	□	□	□
<b>COMMUNICATION LINK:</b> Acting as a communications link between employees and higher management; keeping people in unit informed about things important to them.	□	□	□	□	□
<b>COMMENTS</b>					

### OTHER FACTORS (OPTIONAL)

	□	□	□	□	□
	□	□	□	□	□
<b>COMMENTS</b>					





# PMP RATINGS WORKSHEET

Employee: \_\_\_\_\_

Individual Performance Factors			
Factor	Wgt	Rating	Wgt x Rating
Quality of Work	_____	_____	_____
Quantity of Work	_____	_____	_____
Timeliness	_____	_____	_____
Use of resources	_____	_____	_____
Attend. & punct.	_____	_____	_____
Oral comm.	_____	_____	_____
Written comm.	_____	_____	_____
Coop. & teamwk.	_____	_____	_____
Inter. relat.	_____	_____	_____
Customer service	_____	_____	_____
Public relations	_____	_____	_____
Planning	_____	_____	_____
Problem solving	_____	_____	_____
Creativity	_____	_____	_____
Job knowledge	_____	_____	_____
Handling challenges	_____	_____	_____
Initiative	_____	_____	_____
Administration	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
<b>Sub-Total</b>			

Mgr./Sup. Performance Factors			
Factor	Wgt	Rating	Wgt x Rating
Setting objectives	_____	_____	_____
Budgeting	_____	_____	_____
Org. & wk. allocation	_____	_____	_____
Coordi./Integ.	_____	_____	_____
Monitor. grp. results	_____	_____	_____
Staffing	_____	_____	_____
Def. expectations	_____	_____	_____
Feedback & coach.	_____	_____	_____
Perf. reviews	_____	_____	_____
Hum. res. devel.	_____	_____	_____
Leader. & motiva.	_____	_____	_____
Comm. link	_____	_____	_____
Other	_____	_____	_____
Other	_____	_____	_____
<b>Sub-Total</b>			

Overall "Score"		
	Wgt	Wgt x Rating
Ind. Perf Fact.	_____	_____
Mgr/Sup Fact.	_____	_____
Op. Objectives	_____	_____
<b>Total</b>	(A) <input type="text"/>	(B) <input type="text"/>
<b>Overall "score" = (B) / (A) =</b>		<input type="text"/>

Operational Objectives			
Objective	Wgt	Rating	Wgt x Rating
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<b>Sub-Total</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Overall Performance Rating				
Outstand- ing	Above Standards	Meets Standards	Below Standards	Unsatis- factory
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.5	3.5	2.5	1.5	