

Helena College Performance Review Guide

Performance Development Plan & Assessment (PDPA)

January 1st, 2016

Overview

1. Purpose.
 - a. Reinforce open communication
 - b. Review employee performance objectively to assess job success factors and overall job performance
 - c. Assist in the professional development of individual employees
 - d. Shape employee values and behavior
 - e. Serve as a tool to help coach, teach and mentor employees
 - f. Help identify your best employees
2. Responsibilities.
 - a. Human Resources:
 - i. Serve as policy and procedural subject matter expert
 - ii. Review reports for correctness prior to filing
 - iii. Direct supervisors correct or submit addenda to reports needing clarification
 - iv. Ensure reports are filed in employee personnel files after final submission
 - v. Monitor report submission for timeliness and periodically update leadership
 - b. Directors/Dean's:
 - i. Ensure reports are prepared and submitted in a timely manner
 - ii. Ensure supervisors provide timely counseling on job performance and personal development plans, encouraging self-improvement, when needed
 - iii. Ensure supervisors provide candid assessments of their employees
 - c. Supervisors:
 - i. Meet privately with each employee they directly supervise for a formal performance and personal development discussion within the first 60 days of the rating period(July 1- August 31), mid-point, and after the end of the rating period
 - ii. Elicit and listen to the employee's perspective as well as be prepared to provide specific constructive feedback about the employee's accomplishments and overall performance
 - iii. Finalize the performance review form after considering the employee's input during the performance discussion
 - iv. Sign the performance review form and obtain the employee's signature
 - v. Forward the signed performance review to human resources no later than August 31st
 - d. Employees:
 - i. Share responsibility for a productive performance review meeting by being prepared to engage in a two-way dialogue
 - ii. Ask questions for clarification, if necessary, and make appropriate comments
 - iii. Be prepared to discuss their personal development plan

3. Eligibility.
 - a. Faculty eligibility is determined by Collective Bargaining Agreement.
 - b. Non-faculty members are eligible to receive an annual evaluation who have worked in the same position, under the same supervisor, for at least six months during the current rating cycle. The rating cycle may be extended 90 days to meet this requirement.
 - c. Employees must be non-temporary (.4 FTE or greater).
4. Performance Review Cycle.
 - a. The performance review cycle begins July 1 and ends June 30 of each year and are mandatory. Performance reviews will be based upon worked performed during this time period.
 - b. Initial performance review discussions with employees should be completed in the first 60 days of the cycle or start of employment.
 - c. Mid-point performance review discussions with employees will be accomplished no later than January 31.
 - d. Supervisors will complete the performance review form, thoroughly discuss with the respective employee and submit to human resources no later than August 31.
 - e. Employees may submit written responses to performance evaluations, which will be retained with the evaluation in the employee personnel records. If an employee choses to submit a response, the employee must submit the response to his or her supervisor within 10 working days of the evaluation.
5. Preparing and Completing the Evaluation.
 - a. Complete administrative data (self-explanatory)
 - b. Section 1: Personal Development Plan (PDP). Supervisors and employees jointly work on plan to address professional development desires of the employee and requirements of the organization.
 - c. Section 2 Rating Scale Defined.
 - i. 1= Unacceptable. Employee demonstrates an unacceptable level of knowledge, skills and abilities. Performance level regarding critical tasks is unacceptable. Employee has not responded to additional training and supervision.
 - ii. 4= Acceptable. Employee demonstrates an acceptable level of knowledge, skills and abilities. Performance level regarding critical tasks is acceptable. Employee determines and takes appropriate course of action(s).
 - iii. 7= Superior. Employee demonstrates an exceptional level of knowledge, skills and abilities. Performance level regarding critical tasks is exceptional. Employee does more than is expected and is an example for other to follow.
 - d. Section 2A: Core Behaviors. All employees are rated on this section. Assessments should be based upon bullet characteristics/areas listed under area. Comments on performance are free text that provide specific comments on major accomplishments/shortcomings and address the employee's major strengths and areas to improve upon. Comments on potential are free text that provide specific comments on near and long-term potential.
 - e. Section 2B: Completed for supervisory positions only.
 - f. Section 3: Signatures. Signatures are obtained by supervisor at appropriate time of evaluation process.