

## Instructions for Completing the 2009-2010 UMHHC Leadership Performance Plan and Evaluation Form

Open Doc A, the Leadership Performance Plan and Evaluation Form.

- Step 1: Unlock** the document by clicking on the lock icon. If you cannot see the *Forms* toolbar, click on *View, Toolbars, Forms*.
- Step 2: Double click** on the Header. Enter the employee's name and Emp ID number. This information will automatically appear on each subsequent page.
- Step 3: Re-lock** the document by clicking on the lock icon.
- Step 4: Complete** the Employee Information Section.
- Step 5: Review** Section I, Institutional Goals.
- Step 6: Review or enter** your unit's goals in Section II. As you write your personal goals, you should align them with the institutional and unit goals.
- Step 7: Read** the instructions for Section III.
- Step 8: Identify** your Key Areas of Responsibility (KAR). A KAR represents your main responsibilities as outlined in your job description. Select those KARs that will be your focus for the coming year. (Examples of KARs can be found in **Doc D**)
- Step 9: Identify** one or more goals for each selected KAR. Your goals represent "what" you want to accomplish in the coming year. Be sure your goals align with an institutional/unit goal.
- Step 10: Identify** the criteria for measurement, the expected outcome.
- Step 11: Identify** any critical leadership competency that should be demonstrated for successful accomplishment of this goal. (Reference **Doc B** Leadership Competencies) These two pieces will determine "how" you will measure the successful completion of this goal.
- Step 12: Read** instructions for the Section IV, Professional Development Plan.
- Step 13: Write** a goal for each of the designated institutional leadership competencies. Include a description of the goal, timeline and criteria for measurement.
- Step 14: Write** your own professional development goal. (Optional)

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**Step 15: Meet** with your manager, discuss, and revise as necessary.

**Step 16: Throughout the year**, you and your leader will record observations and milestones in **Comments and Notes, Sections III and IV**. Date and initial all comments.

**Step 17:** At the end of the year,

- a. **Complete** the self-evaluation rating and summary for each goal and overall performance in Section III. Based on your notes, write a summary of your performance for each goal and overall performance.
- b. **Complete** the self-assessment and summary in Section IV, Professional Development Plan, for each goal and overall professional development. This will not be calculated into your overall performance evaluation rating.
- c. Your leader will complete the performance evaluation ratings and summaries for your goals and the assessments and summaries for each professional development goal.

**Step 18: Meet** with your manager to discuss. Your leader will select a final rating and complete the summary.

**Step 19: Sign and date** the document. Your leader will do the same.

**Step 20:** Your leader will provide a **copy** for you and Central Human Resources.

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## Performance Management Process

