

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

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

- Step 1:** **Double click** on the Header. Enter the employee's name and Emp ID number. This information will automatically appear on each subsequent page. Close the Header.
- Step 2:** **Complete** the Employee Information Section.
- Step 3:** **Review** Section I, UMMS Mission Statement.
- Step 4:** **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 5:** **Read** the instructions for Section III.
- Step 6:** **Identify** your Key Areas of Responsibility (KAR). A KAR represents a main responsibility 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 7:** **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 8:** **Identify** the criteria for measurement, the expected outcome. This is one part of "how" you will be evaluated on this goal.
- Step 9:** **Identify** any critical leadership competency that should be demonstrated for successful accomplishment of the goal. (Reference **Doc B** Leadership Competencies) This, with your criteria for measurement, will determine "how" you will be evaluated on this goal.
- Step 10:** **Read** instructions for the Section IV, Professional Development Plan.
- Step 11:** **Write** a goal for each of the designated institutional leadership competencies. Include a description of the goal, timeline and criteria for measurement.
- Step 12:** **Write** your own professional development goal(s). (Optional)
- Step 13:** **Meet** with your leader to discuss and revise as necessary.

Step 14: Throughout the year, you and your leader will **record** observations and milestones in **Comments and Notes, Sections III and IV**. These notes will help write the final evaluation. Date and initial your comments.

Step 15: 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. Complete the summary for the overall professional development. This will not be calculated into your overall performance evaluation rating.
- c. Your leader will also **complete** the performance evaluation ratings and summaries for your goals and the ratings and summaries for each professional development goal.

Step 16: Meet with your leader to discuss. Your leader will select a final rating and write a summary for your performance evaluation.

Step 17: Sign and date the document. Your leader will do the same.

Step 18: Your leader will provide a **copy** for you and Central Human Resources.

Performance Management Process

