

# EVERGREEN

## PERFORMANCE DEVELOPMENT PLAN (PDP) INSTRUCTIONS

The Performance Development Plan (PDP) is a tool to support the employee performance evaluation process for classified staff. It is designed to facilitate performance expectation setting, key skills and abilities identification, goal setting and feedback at the end of the performance period. The PDP is organized into two different forms: 1) Planning Phase and 2) Assessment Phase. Here is an overview of the forms:

<b>Form 1</b> <b>Planning Phase</b> (To be completed at the beginning of the performance period)		
SECTION 1	Performance Expectations and Goals Planning	1. Performance Expectations 2. Training and Development Goals/Opportunities 3. Organizational Support
SECTION 2	Signatures and Filing	1. Signatures 2. Filing

<b>Form 2</b> <b>Assessment Phase</b> (To be completed by the end of the performance period)		
SECTION 1	Performance Assessment	1. Interim Reviews (Optional) 2. Performance Feedback (Results and Goal achievement)
SECTION 2	Signatures, Comments and Filing	1. Signatures and Comments 2. Filing

### PLANNING PHASE Performance Development Plan Form 1 (To be completed at the beginning of the performance period)

#### Preliminary Steps

- The supervisor identifies the linkage of employee's position to organizational mission.
- The supervisor may encourage the employee to draft a Planning Phase PDP of their own.
- The supervisor and the employee meet to share their draft Planning Phase PDPs.
- The supervisor completes a final Planning Phase PDP.
- The supervisor and the employee have a Performance Evaluation meeting where the supervisor shares the final Planning Phase PDP with the employee.

#### SECTION 1: Performance Expectations and Goals Planning

##### Part 1: Performance Expectations

The supervisor and employee meet to determine performance expectations and goals. Typically, expectations and goals noted in the PDP are limited to those that are critical or key to successful job performance. The PDP calls for two categories of performance expectations: Key Results Expected and Key Skills and Abilities Expected.

- A) Key Results Expected** refers to the job performance expectations set for the performance period. Based on the primary areas of responsibility, what are the most important outputs or outcomes expected during the performance period? These expected results should be stated in measurable or observable terms, to the degree possible.
- B) Key Skills and Abilities Expected** refers to the skill and ability performance goals set for the performance period. They are measurable or observable skills and abilities critical to success in a key job role or function.

## **Part 2: Training and Development Goals / Opportunities**

In this section the employee and supervisor will identify key development goals that the employee intends to achieve in the coming year. These are training and development goals and opportunities for the present job and for career advancement.

## **Part 3: Organizational Support (Optional)**

This part is to be completed by the employee only, at his/her option. This is an opportunity for the employee to give the supervisor suggestions as to what support the employee feels he/she needs to be successful.

## **SECTION 2: Signatures and Filing**

### **Part 1: Signatures**

The supervisor, employee and reviewer sign the final Planning Phase PDP.

### **Part 2: Filing**

The supervisor retains one copy of the Planning Phase PDP form, provides a copy to the employee, and a copy to the reviewer. The signed original Planning Phase PDP form is reviewed by Human Resource Services and placed in the employee's official personnel file.

## **ASSESSMENT PHASE** **Performance Development Plan Form 2** (To be completed by the end of the performance period)

### **Preliminary Steps**

- The supervisor may encourage the employee to draft an Assessment Phase PDP of their own.
- The supervisor and the employee meet to share their draft Assessment Phase PDPs.
- The supervisor completes a final Assessment Phase PDP.
- The supervisor and the employee have the final Performance Evaluation meeting where the supervisor shares the final Assessment Phase PDP with the employee.

## **SECTION 1: Performance Assessment**

### **Part 1: Interim Reviews (Optional)**

As an option, Interim Reviews can be used to document interim performance feedback and the updating of expectations for the performance period.

### **Part 2: Performance Feedback**

Performance Feedback is the final performance review and is to be completed by the end of the performance period. The supervisor schedules a performance feedback session with the employee.

The feedback should focus on the degree to which the expected Key Results, Skills, Abilities and Goals (from the Planning Phase PDP) were met for the performance period. Other relevant information may be included as well such as: special achievements, comments about strong performance under unanticipated difficult work place circumstances, etc. Content in the Assessment Phase PDP should be based on observed or verified performance.

The aim of the feedback session is to have an open and constructive discussion that leads to an understanding of how well the employee did in meeting expectations during the course of the performance period.

## **SECTION 2: Signatures, Comments and Filing**

### **Part 1: Signatures and Comments**

The supervisor, employee and reviewer sign the final Assessment Phase PDP. The employee and reviewer may add comments in the comment section and/or attach comments.

### **Part 2: Filing**

The supervisor retains one copy of the Assessment Phase PDP form, provides a copy to the employee, and a copy to the reviewer. The signed original Assessment Phase PDP form is reviewed by Human Resource Services and placed in the employee's official personnel file.

A new performance cycle begins at this point and a new Planning Phase PDP form should be completed.