

Checklist – Performance Management of Classified Staff

Defining Plans

- Visit the Office of Labor Relations(OLR) website for a copy of the *CU Boulder Performance Management User Guide*: <http://hr.colorado.edu/lr/pm/Pages/ClassifiedPMP.aspx>

Review the job description for each position to identify the duties and responsibilities of the position. If not accurate, contact Employment Services.
- Meet with employee to discuss what both of you believe are goals for the coming year.
- Acquire up-to-date CU Boulder Planning and Evaluation Form from the OLR website (do not use older, saved versions).
Link to forms: [Automatic](#) | [Manual](#)

Complete the Planning and Evaluation Form (available online; refer to *PM User Guide* for details):
 - Identify the top 4 to 5 key responsibilities for your employee and create goals linked to the department and university goals from those. If the employee is a supervisor, there must be at least one goal that relates to supervisory duties.
 - Review how to create S.M.A.R.T goals
 - Define measurement methods and results necessary to achieve each rating level.
 - Define weights for goals and core competencies
 - Transfer weights of goals and competencies to Summary of Performance table on page 4. Ensure that the weight values total 100. (The automatic version of the form will display the weights for you.)
 - Write a training plan narrative and a planning narrative
- Review performance plan with the reviewer and acquire signature on page 1.
- Review performance plan with employee and acquire signature on page 1.
- Sign the performance plan and:
 - Give a copy to the employee.
 - Submit the first page to the OLR by **June 1** (or within 30 days of new hire, transfer, promotion, or demotion of classified employees)
- Mark calendar or schedule coaching session (at least one coaching session required).

Coaching and Review

- Prepare by reviewing the following items:
 - The employee's performance plan
 - Your own notes and records
 - Notes and memos from others, such as clients and coworkers, about the work performed
 - Specific examples of the employee's work performed
- Schedule the session in an appropriate meeting room with ample time for an engaging conversation.
- Meet with employee to review the plan and discuss performance toward goals.

Conclude and document the session:
 - Initial and date the first page of the form (under Coaching and Progress Review).
 - Have the employee initial and date the first page of the form.
- Make adjustments to the performance plan, if needed. Give the employee a copy of the updated form; maintain the original in your department records.

- Document your coaching session including any specific issue or areas for improvement that were discussed on the Coaching/Progress Review Notes page.
- Schedule the next coaching session and repeat these steps.

Evaluating Performance

Request that the employee completes a self-evaluation:

- Review the employee's self-evaluation so you fully understand his/her perspective on accomplishments and areas for improvement and include any details you may have overlooked.
- Review the employee's performance for the entire performance cycle, not just the last few months.
- Connect the employee's personal goal achievements to the department and university's mission.
- Review any notes you have kept throughout the year regarding the employee's performance.
- Speak with departments or individuals that the employee works closely with to capture feedback on the employee's performance.

Update the Planning and Evaluation Form (refer to *Performance Management User Guide* for details):

- Enter a description of results achieved for each goal and competency.
- Enter a rating for each goal and competency.
- Transfer ratings of goals and competencies to Summary of Performance table on page 4. (Automatic form will transfer ratings for you.)
- Calculate the total numeric score in the Summary of Performance table.
- Write the total score on the front page in the Evaluation Rating Section. If the total score is a decimal value, round up to the next whole number.
- Check the appropriate box for the overall rating level. If "Not Meeting Expectations," contact OLR for further guidance.

Before meeting with the employee, meet with the Reviewer to discuss evaluation and acquire signature.

- Send completed evaluation to the employee before your meeting so they have time to review the score and your comments.
- Enter an evaluation narrative describing items discussed during the evaluation meeting.
- Review evaluation with employee; acquire signature on front page.

Sign and distribute the evaluation:

- Give a copy to the employee
- Keep a copy for departmental records
- Submit the completed original form to the OLR by **May 1**.
- Prepare to submit new performance plans for the coming evaluation year for classified staff by **June 1**.