

# OTSL Professional Development Series:

## ExponentHR® Performance Management Module: Employee View

How to Access and Review your Performance  
Evaluation Report

Instructional Manual for the Employee

OTSL Professional  
Development Series



# OTSL Performance Management Program

*The Performance Management Program serves as a foundation for aligning employee performance with company goals and client expectations.*

**Performance management** is the process of assessing progress toward achieving predetermined goals and building on that process, adding the relevant communication and action on the progress achieved against these predetermined goals. ~M. Bourne, M. Franco, and J. Wilkes

## Performance Standards are:

- Based on the position, not the individual
- Observable, specific indicators of success
- Meaningful, reasonable and attainable
- Descriptions of proficient or “fully satisfactory” performance once trained
- Expressed in terms of quantity, quality, timeliness, cost, safety or outcomes



# OTSL Performance Management Program

Performance evaluations are a management tool. They can be both beneficial and detrimental to a company. When used in an appropriate fashion, performance evaluations can have an immeasurable impact on employees' morale, performance, and attitude while focusing their attention on company goals.

Performance evaluations give an employee:

- Guidance
- Feedback on how management views his/her performance
- Encouragement
- Constructive criticism

Performance evaluations give a manager:

- Feedback on how the employee views his/her performance
- A clear understanding of the developmental/training needs of employees



Performance Evaluations are an appropriate and timely means for facilitating open dialogue between managers and employees.



# OTSL Performance Management Policy

## OTSL Performance Management Policy

### POLICY OBJECTIVE:

Performance management is intended to be an ongoing process of communication between the supervisor and the employee, focused on helping the employee achieve his or her best workplace results. An effective performance management system accomplishes the following goals:

- Provides direction and clarifies performance expectations.
- Provides feedback and coaching to the employee concerning job performance, both what is done well and what needs improvement.
- Identifies training and professional development needs.
- Serves as documentation of performance.
- Serves as data for human resource decisions.

The underlying principles that guide the performance management system at the Company are that:

- Performance management is a shared commitment to high performance.
- Performance management balances autonomy and accountability at the individual and organizational levels.
- Performance and continuous learning are encouraged and supported.

### POLICY GUIDELINES:

#### I. Performance Management System

The Company supports a performance management system that should include the four components listed below. With each employing work group, these items may not be present, or they may be present in another form. They do not constitute terms or conditions of employment.

##### *A. Performance planning*

Clear performance expectations should be communicated to the employee. These expectations should help the employee align individual goals with those of the work group (client/contract-related) and the Company.

##### *B. Coaching*

Coaching employees for improved performance is an integral part of performance management at the Company. Coaching may take various forms, from observation and informal direction to formal meetings and written documentation, and should occur on a regular basis.

##### *C. Multiple sources of feedback*

To increase the potential for improvement, it is helpful for employees to receive feedback from more than one source. Customers, peers, and direct reports can provide important feedback to supplement the observations of the supervisor. Self-reviews are also strongly encouraged.

##### *D. Performance review/Evaluation Reports*

This is the culminating communication of the performance cycle, focusing on areas of achievement, areas for improvement, and goals for the future.



*Revised 7/01/2008  
Effective 7/01/2008*

# OTSL Performance Management Policy

## OTSL Performance Management Policy

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### II. Performance Review Guidelines

The performance review component warrants particular guidelines due to its significance in providing data for critical Organizational Development/Human Resource decisions.

A. All performance evaluations must be processed using the Performance Management Module within the ExponentHR® system.

1. All staff members should have their performance reviewed at least twice per calendar year. One will be considered to be the Interim Review and will occur at the mid-year point. This review period focuses on the beginning of year to through June 30<sup>th</sup> of that same year. The other will be the Annual Review and will occur after the conclusion of the calendar year. This review period primarily focuses on July 1<sup>st</sup> through December 31<sup>st</sup>. However, applicable and appropriate components from the Interim Review period may also be incorporated as a management decision. This practice should be applied equitably among a work group by the manager.

2. Supervisors may conduct additional reviews as needed by utilizing the Off-Cycle functionality within the ExponentHR® Performance Management Module.

B. Evaluation reports should be discussed and acknowledged by both the supervisor and employee. The employee will receive an electronic copy of the form via ExponentHR®. Printed copies may be requested and used during the one-on-one conferences.

1. An employee's electronic signature/acknowledgement indicates only that the form has been reviewed and discussed with him or her. It does not imply agreement with the review.

2. All electronic copies of evaluation reports will be maintained within the ExponentHR® system.

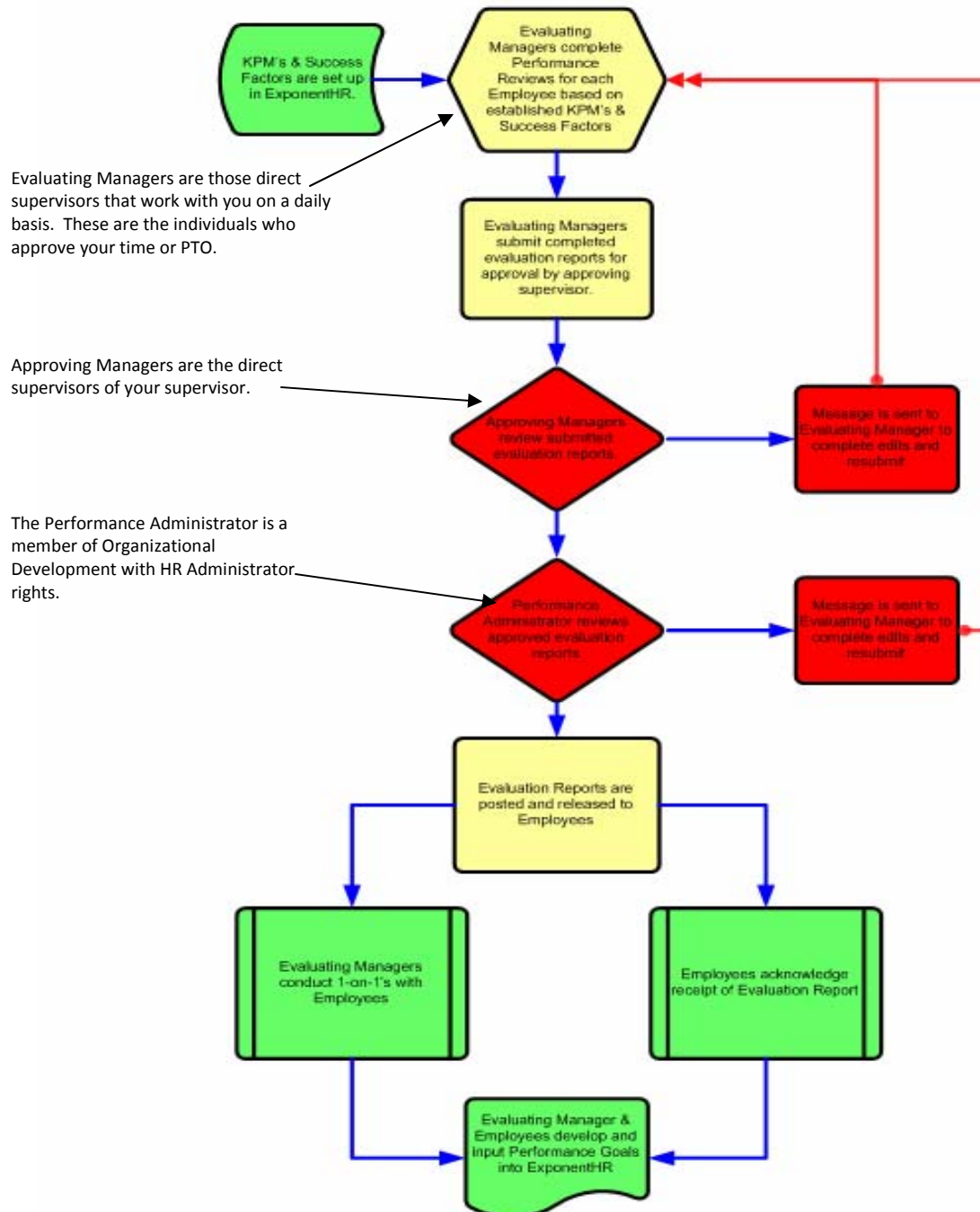


*Revised 7/01/2008  
Effective 7/01/2008*



# OTSL Performance Management Process

PERFORMANCE MANAGEMENT FLOW CHART: EMPLOYEE VIEW



# OTSL Performance Management Process:

## On what am I being evaluated?

Each employee is considered to be a part of a work group. Each work group has a specific set of standards to which the employee is expected to perform at a fully satisfactory level. These standards are expressed as Key Performance Measures or KPM's. For each KPM there are goals or objectives called Success Factors. Success Factors explain the actions that help to fully satisfy the overall intent of the KPM.

In the back of this manual you will find the Key Performance Matrix for your work group. These KPM's, Success Factors and Rubrics were used by your evaluating manager to complete your Evaluation Report.

You will also notice that each KPM and Success Factor carries a different weight. These weights were defined by the team of managers and supervisors within your work group. While we consider each KPM and Success Factor equally important, they each have different levels of importance. For example, in cases wherein the Client deems safety as a target or goal, the KPM or Success Factor that deals with safety will have a higher weight than in a situation wherein employees are primarily working at their desks.

### ***Snapshot...***

**KPM's** or **Key Performance Measures** are the overarching focus area as determined by the company and the client.

The **Success Factors** or **Goals/Objectives** are the activities or characteristics that help you achieve the KPM.

The **Descriptions** provide an outline of what proficiency looks like.

The **Weights** explain how many points are allotted per KPM and Success Factor.

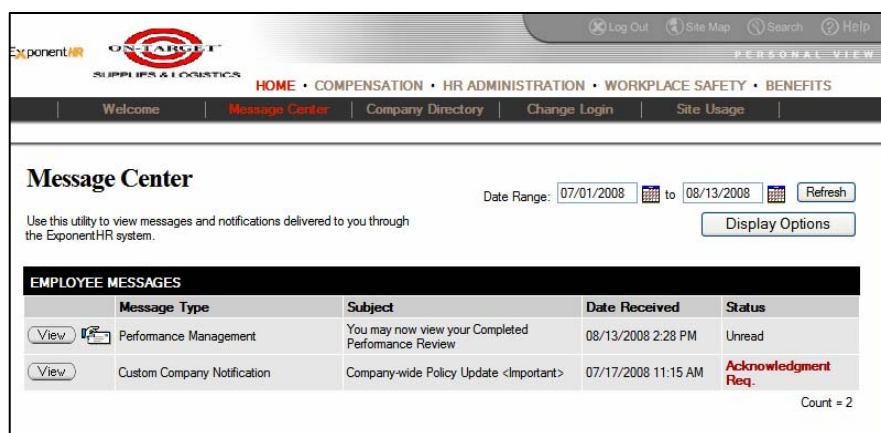


# OTSL Performance Management Process: Performance Evaluation Report Acknowledgement

Once your evaluation report has been posted, you will receive an email notification and a message center notification that your Evaluation Report is ready for viewing and acknowledgement. All employees must acknowledge that they have received their Evaluation Report. Acknowledgement does not mean acceptance of or agreement with the information found on the Evaluation Report.

Once reviewed, you have the opportunity to make comments on your Evaluation Report online. These comments will be saved as a part of your evaluation. Please feel free to make comments regarding your scores, journal entries or employee goal entries.

All acknowledged Evaluation Reports become part of your Evaluation History within ExponentHR® under your profile.



The screenshot displays the ExponentHR Message Center interface. At the top, there is a navigation bar with links for HOME, COMPENSATION, HR ADMINISTRATION, WORKPLACE SAFETY, and BENEFITS. Below this, a 'Message Center' section is visible, featuring a date range selector (07/01/2008 to 08/13/2008) and a 'Refresh' button. A table titled 'EMPLOYEE MESSAGES' lists two messages:

Message Type	Subject	Date Received	Status
Performance Management	You may now view your Completed Performance Review	08/13/2008 2:28 PM	Unread
Custom Company Notification	Company-wide Policy Update <Important>	07/17/2008 11:15 AM	Acknowledgment Req.

At the bottom right of the table, it indicates 'Count = 2'.



# OTSL Performance Management Process: Performance Evaluation Report Acknowledgement

A Green J or a Black G indicates that there is a journal entry or comment within that section.

KPM's appear as folders above the Goals and Objectives.

The Goals & Objectives are the same as the Success Factors. The ratings are based upon the KPM Matrices.

This is the manager view of the Performance Evaluation Report.

The Overall Rating is the rounded score. Both this and the KPM Total are based on a 5 point scale.

The Score column presents the portion of the KPM Total that each section represents.

The KPM Total can be found at the bottom. This is the TRUE score for the Evaluation Report

**Performance Review - Edit**

Immediate Reviewer: NORMAN, KANESHA D  
Make any necessary changes to your employee's Performance Review.

Legend Submit Submit & Approve Save Cancel Print Preview Options Delete

**Employee Details**

Employee Name	Review Type: Annual
Position Title	Review Period: 01/01/2008 - 06/30/2008
Review Date	Department: Onco EHS
Reviewer	Status: Drafted
Approvers	Due Date: 07/31/2008
Employee and Contributor Input: <a href="#">Invitations</a>	Hide and Restore Layers: <a href="#">View</a>

**Review Summary**

Overall Performance: Overall Rating: 5.5

Overall Comments: (Input: J)  
I great asset to the team. Diligent worker, punctual, and great attendance.  
I door handle on forklift due to carelessness.

Key Performance Measures (Drives Overall Rating)	Derived Rating	Weight %	Score
Client Satisfaction	2.40	15.00	0.36
Goals and Objectives	Rating		
Assurance of Supply	3.3	20.00	
Contract Awareness	3.3	20.00	
Customer Service	3.3	20.00	
Responsiveness	2.2	20.00	
Results-oriented	1.1	20.00	
Cost 1	2.00	15.00	0.30
Goals and Objectives	Rating		
Attendance	2.2	20.00	
Flexibility	2.2	20.00	
Productivity	2.2	20.00	
Punctuality	3.3	20.00	
Work to Completion	1.1	20.00	
Environmental/Safety 1	7.25	30.00	2.17
Goals and Objectives	Rating		
Compliance	5.5	25.00	
No Accidents	10.10	25.00	
No Liabilities	9.9	25.00	
Procedure & Policy Awareness	5.5	25.00	
Quality	5.00	25.00	1.25
Goals and Objectives	Rating		
Awareness	10.10	20.00	
Focused team-free	4.4	20.00	
Independent Worker	4.4	20.00	
Self-Starter	4.4	20.00	
Team-minded	3.3	20.00	
Technology	5.00	15.00	0.75
Goals and Objectives	Rating		
Equipment	2.2	33.33	
Equipment/HR	3.3	33.33	
Training	10.10	33.33	
<b>Key Performance Measure Totals:</b>		<b>100.00</b>	<b>4.8</b>

**Management Notes** [Add Note](#)

# Sections of the Evaluation Report

**Performance Review - Add**

**Ladonna D Witcher**

Complete your employee's Performance Review by entering general comments about the employee's performance, rating the employee's performance in each category, and adding notes related to each category as necessary.

[Legend](#) [Submit](#) [Submit & Approve](#) [Save](#) [Cancel](#) [Print Preview](#) [Options](#) [Delete](#)

**Employee Details**

<b>Employee Name:</b>	Witcher, Ladonna D	<b>Review Type:</b>	Annual
<b>Position Title:</b>	Organizational Development Technician	<b>Review Period:</b>	01/01/2008 - 06/30/2008
<b>Hire Date:</b>	11/13/2006	<b>Department:</b>	Organizational Development
<b>Reviewer:</b>	Norman, Kianesha D	<b>Status:</b>	Drafted <a href="#">History</a>
<b>Approver:</b>	Brooks-Smith, Lorene	<b>Due Date:</b>	07/31/2008
<b>Employee and Contributor Input:</b>	<a href="#">Invitations</a>	<b>Hide and Restore Layers:</b>	<a href="#">View</a>

**Review Summary**

**Overall Performance:** Overall Rating: [v](#)

**General Comments:**

**Key Performance Measures**

	Derived Rating	Weight %	Score
<b>Client Satisfaction</b>		20.00	
<b>Goals and Objectives</b>	<b>Rating</b>		
Assurance of Supply	<a href="#">v</a>	20.00	
Contract Awareness	<a href="#">v</a>	20.00	
Customer Service	<a href="#">v</a>	20.00	
Responsiveness	<a href="#">v</a>	20.00	
Results-oriented	<a href="#">v</a>	20.00	
<b>Communication</b>		20.00	
<b>Goals and Objectives</b>	<b>Rating</b>		
	<a href="#">v</a>	20.00	

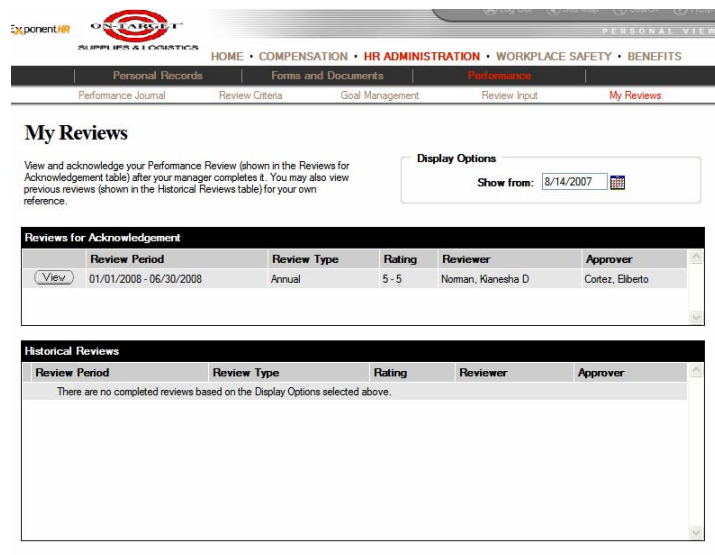
**The Evaluation Report has several sections:**

**GREEN** – The Employee Details section has pre-populated data about the employee, the reviewers, and the status of the report. This is also the section that contains information for invitations to the EMPLOYEE and other CONTRIBUTORS to make comments on the employee's performance.

**ORANGE** – The Review Summary section contains the OVERALL PERFORMANCE icon which explains the scoring rubric and the OVERALL RATING box that is completed prior to submission. This is also where you will find any comments that have not been allocated to a specific KPM or Success Factor.

**RED** – The Key Performance Measures section presents each KPM and the associated Success Factors. In this section you will select the rating for that factor. As you make entries the Derived Rating and the Score boxes will automatically update.

# OTSL Performance Management Process: Accessing Your Review



ExponentHR **OTSL**  
SUPPLIES & LOGISTICS

HOME • COMPENSATION • **HR ADMINISTRATION** • WORKPLACE SAFETY • BENEFITS

Personal Records Forms and Documents **Performance** Review Input My Reviews

Performance Journal Review Criteria Goal Management

### My Reviews

View and acknowledge your Performance Review (shown in the Reviews for Acknowledgement table) after your manager completes it. You may also view previous reviews (shown in the Historical Reviews table) for your own reference.

Display Options  
Show from: 8/14/2007

Review Period	Review Type	Rating	Reviewer	Approver
<a href="#">View</a> 01/01/2008 - 06/30/2008	Annual	5 - 5	Noman, Kianesha D	Cortez, Elberto

Review Period	Review Type	Rating	Reviewer	Approver
There are no completed reviews based on the Display Options selected above.				

After you have logged on to ExponentHR:

Personal View → HR Administration → Performance → My Reviews

You will notice your review in the top section. This section provides you with information regarding the review period, the type of review, the reviewer and the approver. Click the VIEW button in order to review the evaluation report.

In the future your old reviews will be located in the bottom section for easy access and review.

# OTSL Performance Management Process:

## Accessing Your Review

You will notice a pop-up text box that explains that your evaluation report is ready for review and that you will need to acknowledge your receipt of the report. Click OK and take some time to review the comments and scores.

	Level - Description
Scale	
1	Unsatisfactory - Performs poorly in this area
2	Developing - New to the role/has not yet demonstrated a complete grasp of expectation
3	Skillful - Can perform with little to no intervention
4	Proficient - Performs with no intervention
5	Mastery - No issues in this area/Little to no room for growth

Once you have reviewed (and made comments, if necessary), select the **ACKNOWLEDGE REVIEW** button at the top of the screen. You will then be asked if you are certain that you wish to acknowledge the review. Select OK.

# The Performance Management Module

The Performance Management Module within ExponentHR not only is the area where your evaluations are produced and stored, but also a section within the system wherein Employees and Managers can openly communicate about and update each other on performance on goals, objectives, actions items and targets.

**Function:** Performance Journals

**Navigation:** HR Administration → Performance → Performance Journals

The screenshot displays the ExponentHR web application interface. The top navigation bar includes links for HOME, COMPENSATION, HR ADMINISTRATION, WORKPLACE SAFETY, and BENEFITS. The HR ADMINISTRATION section is active, showing sub-links for Performance Journal, Review Criteria, Goal Management, Review Input, and My Reviews. The main content area is titled 'Performance Journals' and includes instructions on how to use the journal to document performance throughout the year. It also features a 'Display Options' section with filters for Date Range (05/14/2007 to 05/13/2008), Sort By (Date Created), and Type (All). Below this, there is a table titled 'Vernon Bosley's Performance Journal' with columns for Created, Updated, Period, Subject, and Type. The table is currently empty, with a message stating 'There are no Journal Entries based on the Display Options selected above.' To the right of the table is a 'Performance Journal Entry - Add' form. This form includes fields for 'Alternate Supervisor' (NORMAN, KIANESHA D), 'Author' (Norman, K), 'Date Created' (6/30/2008 3:42:24 PM), and 'Last Update' (6/30/2008 3:42:24 PM). It also has 'Save' and 'Cancel' buttons. The form is divided into sections for 'Management Journal' and 'Description'. The 'Management Journal' section includes fields for 'Subject', 'Review Period' (01/01/2008 - 06/30/2008), 'Type' (Key Performance Measure), 'Key Performance Measure' (Assurance of Supply), and 'Goal and Objective' (Problem Resolution). The 'Description' section is a large text area for additional notes. At the bottom of the form, there is a footer with the date/time (6/30/2008 3:42:25 PM CDT), the user name (NORMAN, KIANESHA D), and the company name (ON-TARGET SUPPLIES & LOGISTICS, LTD).

**Description:** Performance Journals allow employees and managers to enter comments regarding KPM's, Success Factors, Goals or general comments about performance or activities. By selecting ADD ENTRY, the ExponentHR wizard help you make a entry. Entries can either be private or shared with your manager.

# The Performance Management Module

The Performance Management Module within ExponentHR contains valuable information regarding your evaluation reports and the criteria by which you are evaluated.

**Function:** Review Criteria

**Navigation:** HR Administration → Performance → Review Criteria

**Review Criteria**

You will be reviewed on the following performance review criteria during your next scheduled review period, 07/01/2008 - 12/31/2008 (Default Schedule). You may create Performance Journals related to each of the review criteria. You may also view the ratings scale your manager will use when completing your review.

[Print Preview](#) [Options](#)

**Employee Details**

Employee Name:	Beasley, Vernon E
Employee Title:	Material Handler
Supervisor:	Porter, Keith R

**Performance Categories**

Category	Description
1. 1:	
2. 2:	
3. 3:	
4. 4:	
5. 5:	
6. 6:	
7. 7:	
8. 8:	
9. 9:	
10. 10:	

**Key Performance Measures**

	Weight %
Client Satisfaction	15.00
Goals and Objectives	Weight %
Assurance of Supply	20.00
Contract Awareness	20.00
Customer Service	20.00
Responsiveness	20.00
Results-oriented	20.00
Cost 1	15.00
Goals and Objectives	Weight %

**Description:** The Review Criteria section displays the same information that is found on the KPM Matrix. By hovering over the KPM or Success Factor name you can view the description of each.

# The Performance Management Module

The Performance Management Module within ExponentHR contains tools that assist with the management of employee-level targets and action items.

**Function:** Goal Management

**Navigation:** HR Administration → Performance → Goal Management

The screenshot shows the ExponentHR web application interface. At the top, there is a navigation bar with links for HOME, COMPENSATION, HR ADMINISTRATION (highlighted), WORKPLACE SAFETY, and BENEFITS. Below this is a sub-navigation bar with links for Personal Records, Forms and Documents, Performance (highlighted), and My Reviews. The main content area is titled "Goal Management" and contains instructions on how to use the feature. It includes a "Review Period" of 07/01/2008 - 12/31/2008 and a "Review Year" of 2008. Below the instructions, there is a table titled "Period: 07/01/2008 - 12/31/2008" with columns for Title, Type, % Complete, Due Date, and Status. The table is currently empty, with a message stating "There are no employee specific goals for the Review Period displayed above." Below this table, there is another section titled "Goals suggested by employee" with an "Add New Goal" button. This section also has a table with columns for Title, Type, Date Submitted, Due Date, and Status, which is also empty, with a message stating "No suggested goals exist. Click 'Add New Goal' to add a new goal."

**Description:** During your 1-on-1 meeting with your evaluating manager, you will work together to develop goals or targets for you. In some cases, you will want to determine other goals or related targets. Use this section to review the inputs made by your evaluating manager and to create your own targets. By clicking the ADD NEW GOAL button, the wizard will assist you with the process. You and your manager will also be able to update your progress on the inputted goals and targets.



# The Performance Management Module

The Performance Management Module within ExponentHR supports a 360 review platform. Managers, Contributors and Employees have the ability to evaluate the performance of the employee in a structured environment.

**Function:** Review Input

**Navigation:** HR Administration → Performance → Review Input

The screenshot shows the ExponentHR interface for the 'Review Input' page. The top navigation bar includes 'HOME', 'COMPENSATION', 'HR ADMINISTRATION' (selected), 'WORKPLACE SAFETY', and 'BENEFITS'. Below this, a sub-navigation bar has 'Personal Records', 'Forms and Documents', 'Performance' (selected), and 'My Reviews'. The 'Performance' section is further divided into 'Performance Journal', 'Review Criteria', 'Goal Management', 'Review Input' (selected), and 'My Reviews'.

The main content area is titled 'Review Input'. It contains a text box explaining the review process: 'Review Input is a mechanism by which managers may request additional input related to their direct reports. If you are invited by a manager to complete a Self Review, create the review on this page. You may also view and edit Self Reviews you previously created. Reviews will only be displayed if you have been invited by a manager to submit input.'

To the right of the text box is a 'Display Options' box with a 'Show from:' date picker set to '8/14/2007' and a checkbox for 'Show Completed'.

Below the text box is a section titled 'Self Reviews' which contains a table with the following columns: 'Review Period', 'Review Type', 'Date Invited', 'Due Date', 'Date Submitted', and 'Reviewer'. The table is currently empty, with a message stating: 'There are no Self Reviews based on the Display Options selected above.'

**Description:** OTSL strongly believes in 360 reviews. Therefore, gathering input from the employee about his or performance is important. In this section you will find the self-reviews that you completed or have been asked to complete.



# Performance Management Schedule

Performance Management Schedule (Part II)

Start Date	Activity	Description	Acct.	End Date
Wednesday, August 13 <sup>th</sup>	Orientation	Employee orientation to the Performance Mgmt Process; Delivery of the Orientation Manual via email/ExponentHR®.	OD	Wednesday, August 13 <sup>th</sup>
Friday, August 15 <sup>th</sup>	Performance Review Instructions	Managers receive via email the Performance Review Administration Packet from OD. It will contain instructions for how to conduct the sessions and explanations of the subsequent steps.	OD/Mgr	Friday, August 15 <sup>th</sup>
Saturday, August 16 <sup>th</sup>	Posting of Reviews	Reviews are posted for Employee viewing by Performance Administrator.	OD	Saturday, August 16 <sup>th</sup>
Monday, August 18 <sup>th</sup>	Employee Acknowledgement	Employees are required to go into ExponentHR® and acknowledge their receipt of the Evaluation Reports.	EE	Friday, August 22 <sup>nd</sup>
Monday, August 18 <sup>th</sup>	Schedule posted	Managers post schedules for Performance Review Meetings	Mgr	Monday, August 18 <sup>th</sup>
Tuesday, August 19 <sup>th</sup>	Employee Self-Evaluations	Employee self-evaluations are posted by OD onto Survey Management; Employees receive notification to complete them.	OD/EE	Sunday, August 31 <sup>st</sup>
Wednesday, August 20 <sup>th</sup>	Performance Review Meetings	Managers begin holding 1-on-1 sessions with employees.	Mgr	Sunday, August 31 <sup>st</sup>
Wednesday, August 20 <sup>th</sup>	Employee Journals	Employees begin entering journals regarding their performance	EE	Sunday, August 31 <sup>st</sup>
Wednesday, August 20 <sup>th</sup>	Goal Management	Managers enter goals developed with Employees during Performance Review Meetings into Goal Management section of ExponentHR®.	Mgr	Friday, September 5 <sup>th</sup>
Wednesday, August 20 <sup>th</sup>	Paperwork	Copies of the following documents are sent to OD for filing: Signed Evaluation Report & Coaching Worksheet	Mgr	Tuesday, September 2 <sup>nd</sup>

The above schedule presents the start and end dates for the upcoming activities associated with the Performance Management Process.

# Attachment: Key Performance Matrices

## OTSL Corporate/Madison Central Group

Performance Management:  
Key Performance Measures

Key Performance Measure	Weight	Success Factor	Max Points	Description
Performance- Doing what you say you will do	20	Attendance/Punctuality	4	Present and on time for work-related activities
		Prioritization	4	Ability to perform work in an organized, time-sensitive manner
		Work to Completion	4	Completes a days work within a day/does not leave work unfinished
		Quality (ISO, Procedures, Policies)	4	Focuses on producing high level outputs/outcomes
		Cost Control	4	Focuses on performing efficient tasks without waste of time or materials
Technology- Utilization of the tools made available to you in order to get your job done	20	Expense/HHR	5	Is knowledgeable about & uses Expense/HHR appropriately based on position
		Exchange	5	Is knowledgeable about & uses Exchange appropriately based on position
		Share Point/Report/Website	4	Is knowledgeable about & uses Share Point/Report/Website appropriately based on position
		Commerce/Comm	5	Is knowledgeable about & uses Commerce/Comm appropriately based on position
		Hardware/Handheld Devices	1	Is knowledgeable about & uses hardware (fax, copier, scanner, phone) and handheld devices appropriately based on position
Client Satisfaction-Getting the client what they want when they want it	20	Customer Service	4	Projects a customer oriented attitude/sometimes ownership
		Responsiveness	4	Responds to internal/external requests within 24-48 hours of receipt
		Assurance of Supply	4	Is proactive, seeks efforts to effective resolutions, works with end in mind
		Contract Awareness	4	Works in a manner that adheres to the expectations set forth in contract
		Results-oriented	4	Focuses on the outcome and goals of work-related activities
Communication- establishing & maintaining open communication within OTSL and with our customers about performance	20	Spoken	2	Is knowledgeable about & uses Spoken for effective communication
		Channel Development/Maintenance	2	Effectively reaches out to new or reactivated potential clients/partners
		Internal/External Reporting	8	Delivers accurate, relevant/timely reports
		Written Communication	4	Communicates clearly, effectively & in a timely manner (in written form)
		Verbal Communication	4	Communicates clearly, effectively & in a timely manner (in verbal form)
Trust- earning and developing trust among internal & external customers/vendors	20	Professionalism	4	Performs tasks and activities in a manner that is suitable for the work environment and for interaction with clients
		Work Ethic	4	Demonstrates in actions an importance of work and its accountability to strengthen character
		Consistency	4	Demonstrates in actions an adherence to principles, course, forms and behavior related to the overall mission
		Timeless/Efficiency	4	Demonstrates in actions a skillfulness in avoiding wasted time and effort and proactively seeks such resolutions
		Ethics & Morals	4	Demonstrates in actions an understanding of the rules or standards governing a professional business environment

Scoring Rubric							Level - Description
8-pt scale	7-pt scale	6-pt scale	5-pt scale	4-pt scale	3-pt scale	2-pt scale	
0-1	0-1	0	0-1	0-1	0-1	0	Unsatisfactory - Performs poorly in this area
3	3	1	2	2			Developing - New to the role/has not yet demonstrated a complete grasp of expectation
5	5	2	3	3	2	1	Skillful - Can perform with little to no intervention
7	6	3	4				Proficient - Performs with no intervention
8	7	6	5	4	3	2	Mastery - No issues in this area/Little to no room for growth

# Attachment: Key Performance Matrices

## Texas Instruments Work Group Performance Management: Key Performance Measures

Key Performance Measure	Weight	Success Factor	Max Points	Description
Cost	25	1.Punctuality	7	On time for work, from breaks, for meetings/trainings
		2.Attendance	7	No "no call/no shows" for work, meetings, or trainings
		3.Work to Completion	6	Completes a days work within a day/does not leave work unfinished
		4.Flexibility	5	Willing to be flexible as it pertains to assignments ,shift, work day
Environmental/Safety	5	1.No accidents	2	Not involved in any accidents
		2.No liabilities/Internal Safety Audits	1	Actions not producing any liabilities for the Employer or Client/Internal Safety Audits done
		3.Compliance	2	Completion in a timely manner of the safety (and related) quizzes/training
Technology	8	1.Training	2	Training hours completed on time
		2.SAP	2	Is knowledgeable about & uses SAP appropriately based on position
		3.ExponentHR	2	Is knowledgeable about & uses ExpHR appropriately based on position
		4.SharePoint	2	Is knowledgeable about & uses SharePoint appropriately based on position
Responsiveness	17	1.Accountability	4	Accountable for role/position and associated tasks/did not contribute to a CAR
		2.Responsibility	4	Takes responsibility/ownership for actions. Performs job-related tasks (includes excel proficiency)
		3.Communication-internal customer	3	Accurate written & verbal communication within one business day (includes email proficiency)
		4.Communication-external customer	3	Accurate written & verbal communication within one business day (includes email proficiency)
		5.Flexibility	3	Responsive & time conscious
Assurance of Supply	20	1.Problem Resolution	5	Ability to seek resolution to problems/issues as they occur
		2.Results oriented	5	Focuses on the outcome and the goals of work-related activities
		3.Proactive	5	Performs activities that are preventative in nature
		4.Timeliness	5	Stock room- On-time stock ups/issue resolution, Dock- On-time receiving & deliveries
Quality	25	1.Work Ethic- self starter	5	Does not have to be micromanaged/knows what to do and how to do it and then does it
		2.Work Ethic- independent worker	4	Works well alone without direct oversight
		3.Work Ethic- team-minded	4	Works well with others when necessary
		4.Work Ethic- focused/error-free	8	Does not make errors as it pertains to work-related tasks & follows procedures
		5.Awareness	4	Aware of CETRAQ and the implications/ Aware of job or position requirements

Scoring Rubric							Level - Description
8-pt scale	7-pt scale	6-pt scale	5-pt scale	4-pt scale	3-pt scale	2-pt scale	
0-1	0-1	0	0-1	0-1	0-1	0	Unsatisfactory - Performs poorly in this area
3	3	1	2	2			Developing - New to the role/has not yet demonstrated a complete grasp of expectation
5	5	2	3	3	2	1	Skillful - Can perform with little to no intervention
7	6	3	4				Proficient - Performs with no intervention
8	7	6	5	4	3	2	Mastery - No issues in this area/Little to no room for growth

# Attachment: Key Performance Matrices

## Oncor Work Group

Performance Management:

Key Performance Measures

Key Performance Measure	Weight	Success Factor	Max Points	Description
Environmental Safety	30	1.No accidents 2.No liabilities/Internal Safety Audits 3.Compliance 4.Procedure & Policy Awareness	10 10 5 5	Not involved in any accidents Actively participating any liabilities for the Employee or Client Internal Safety Audits done Completion in a timely manner of the safety and related reports/training Is aware of policy and procedures and conducts him/herself in accordance with them at all times
Cost	15	1.Productivity 2.Attendance 3.Work to Completion 4.Flexibility 5.Productivity	3 3 3 3 3	On time for work, from breaks, for meetings/training No "no call/no shows" for work, meetings, or trainings Completes a days work within a day/does not have work unfinished Willing to be flexible as it pertains to assignment, shift, work day Focuses on the outcome and the goal of work-related activities
Quality	25	1.Work Ethic - self starter 2.Work Ethic - independent worker 3.Work Ethic - team oriented 4.Work Ethic - those do more 5.Awareness	4 4 3 4 10	Does not have to be micromanaged/knows what to do and how to do it and then does it Works well alone without direct oversight Works well with others when necessary Does not make errors as it pertains to work-related tasks & follows procedures Aware of contracts scope of work and the implications/Aware of job or position requirement
Technology	15	1.Training - Job Related 2.DEDS 3.Exposure BIR	10 2 3	Training hours completed on time Dist Equipment sys Is knowledgeable about & uses BpHR appropriately based on position
Client Satisfaction	15	1.Customer Service 2.Responsiveness 3.Assurance of Supply 4.Contract Awareness 5.Results-oriented	3 3 3 3 3	Projects a customer orientation; assumes ownership Responds to internal/external requests within 24-48 hours of receipt Is proactive, seeks efficient & effective solutions, works with end user mind Works in a manner that adheres to the expectations set forth in contracts Focuses on the outcome and goal of work-related activities

Scoring Rubric								Level - Description
10-pt	8-pt scale	7-pt scale	6-pt scale	5-pt scale	4-pt scale	3-pt scale	2-pt scale	
0-2	0-1	0-1	0	0-1	0-1	0-1	0	Unsatisfactory - Performs poorly in this area
3	3	3	1	2	2			Developing - New to the role has not yet demonstrated a complete grasp of expectation
5	5	5	2	3	3	2	1	Skillful - Can perform with little to no intervention
8	7	6	3	4				Proficient - Performs with no intervention
10	8	7	6	5	4	3	2	Mastery - No issues in this area/Little to no room for growth

# Attachment: Goal Management Process

## EXPONENTHR®: GOAL MANAGEMENT

### Navigation:

- ❖ Personal View->HR Admin->Performance->Goal Mgmt
- ❖ Mgmt View->HR Admin->Performance Mgmt->Performance Mgmt Setup->EE Goal Mgmt

**Goal:** To facilitate open and continuous dialogue regarding employee performance, outcomes and outputs against established goals, objectives and standards by utilizing ExponentHR® functionality.

**OBJECTIVE 1:** Managers to develop objectives for each employee that relate to their job description and the established KPM's and success factors.

**OBJECTIVE 2:** Employees to develop action items that pertain to established objectives, KPM's, or success factors.

**OBJECTIVE 3:** Develop, implement and maintain open dialogue regarding performance, outcomes, and outputs.

### MANAGEMENT STEPS:

#### *Adding a New Goal (Figure 1)*

- Under Employee Goal Management, select ADD NEW GOAL
- Enter the TITLE of the objective, task or action item
- Select the appropriate REFERENCE: Employee Specific Goal, KPM, Objective/Success Factor
- Enter a clear DESCRIPTION of the item that states what the outcome or output is to be and the standard at which it should be produced.
- Enter a DUE DATE
- Select either SAVE (keep for later edits), SUBMIT (post to employee's view), CANCEL (delete entry)
- Your employee will receive notification of your posting as an approved goal. (Figure 5)

#### *Approving a Submitted Goal (Figure 2)*

- Under Employee Goal Management, scroll to the second text box
- Select VIEW to review the goal, edit as needed
- Select Approve to post goal and to notify employee of posting

#### *Updating Progress to an Approved Goal (Figure 3)*

- Under Employee Goal Management, select a goal to review
- Select VIEW to review the goal, update the completion status/enter journal notes as needed
- Select SAVE to complete update

### EMPLOYEE STEPS:

#### *Submitting a Goal (Figure 4)*

- Under Goal Management, select ADD NEW GOAL
- Enter the TITLE of the objective, task or action item
- Select the appropriate REFERENCE: Employee Specific Goal, KPM, Objective/Success Factor
- Enter a clear DESCRIPTION of the item that states what the outcome or output is to be and the standard at which it should be produced.
- Enter a DUE DATE
- Select either SAVE (keep for later edits), SUBMIT (submit to manager for approval), CANCEL (delete entry)
- Your manager will receive notification of your submission and will be asked to review and approve it.

#### *Updating Progress to an Approved Goal (Figure 3)*

- Once your manager has approved the goal you can update on your progress:
- Make a journal entry (private or visible)
- Update completion status (by percentage)

# Attachment: Goal Management Process

## SAMPLE SCREENSHOTS

Figure 1: Adding a New Goal

Figure 4: Submitting a Goal for Approval

Figure 2: Approving a Submitted Goal

Figure 5: Receiving Notification

Figure 3: Updating Progress towards a Goal

# Attachment: Goal Management Process

## GUIDELINES FOR CONDUCTING AN EFFECTIVE PERFORMANCE REVIEW

### Prepare yourself and your employee.

- schedule ample time and a private place for the discussion
- notify the employee in advance, in writing
- review documentation (notes, letters, files, etc.) before working on the review
- remember that performance management is a key service to your employees and unit

### Make it “priority time.”

- create an agenda for the meeting
- minimize interruptions

### Set a tone of collaboration.

- start the discussion on a positive note
- encourage your employee’s participation

### Be clear about your purpose.

- reinforce that the discussion will address strengths and areas for improvement

### Review performance expectations.

- discuss the position description, units’ reasons for needing the position
- be clear about performance standards within your unit

### Discuss performance that is below, meets, and exceeds expectations.

- use language that is clear and specific; use examples
- describe performance, not personality

### Ask employee what he/she thinks.

- allow employee to speak freely before responding to his/her comments
- actively listen to your employee
- clarify your employee’s concerns, then address them

### Set goals to:

- improve performance in targeted areas
- build on strengths
- develop the employee’s knowledge, skills, and abilities
- align the employee’s work with the needs of the unit

### Agree to follow up.

- schedule at least one interim check-in on performance during the year
- ask how your employee prefers to receive feedback (written, verbal)
- discuss how your employee likes to be recognized for good work

### Close with encouragement.

- offer your help and support
- end on a positive note by summarizing employee strengths and contributions

# Attachment: Goal Management Process

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## COACHING WORKSHEET

*Use this worksheet to prepare for and make notes of your coaching discussion*

Employee name \_\_\_\_\_

Supervisor name \_\_\_\_\_ Meeting date \_\_\_\_\_

Performance Areas Meeting and Exceeding Expectations

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Performance Areas Identified for Improvement

--

Additional Discussion Items (e.g., project updates, progress on priorities, training and professional development, employee's concerns)

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Next Steps in Employee Development (for both the supervisor and employee)

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