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 **Performance Management**

Attached you will find an updated copy of the Performance Management tool. As part of ongoing performance management, directors and managers meet with their staff each year in August to summarize accomplishments for the year and define accountabilities for the upcoming year. The Job Accountabilities section of the updated tool includes a category marked “Other,” which allows you to document other areas of the staff member’s responsibilities that may be identified throughout the year. For your reference, below is a summary of the different parts of the Performance Management tool.

Part I – Values

Provide comments and rate the accomplishment of the intended action relative to the core value.

Part II – Competencies

Rate and comment on the competency assigned during the current performance period. The competencies can be found in the *MDRT Competency Dictionary.*

Part III – Job Accountabilities

Provide comments and rate the specific areas of responsibility that were documented on your performance management tool. These accountabilities do not reflect your entire job responsibility but have been chosen as areas that need a greater focus.

Part IV – Detailed Performance Rating and Development Planning

Opportunities for Development is a section that needs to be completed by both the employee and supervisor. An agreement should be made as to what training will be provided, and this agreement should also be documented on the upcoming year’s performance tool.

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| Employee Name:       | Position:       |
| Director Name:       | Department:  |

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| **Values** | **Intended Action on Values** | **Self-Comments/Evidence** | **Manager Comments** | **Rating** |
| **Teamwork: Embrace a collaborative, harmonious and communicative environment.** |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| **Innovation: Embrace and drive innovation and change.** |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| **Competencies**(refer to MDRT Competency dictionary) | **Plan to demonstrate competencies** (what will success look like and what are the timelines for achievement?) | **Self-Comments/Evidence** | **Manager Comments** | **Rating** |
| Competency: Target Level:  |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| Competency: Target Level:  |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| **Job Accountabilities** | **Outcomes and Milestones**What will success look like and what are the timelines for achievement? | **Self-comments/Evidence:** | **Manager Comments:** | **Rating** |
| Description:  |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| Description:       |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |
| Other: Discuss areas of responsibility that weren’t identified in the accountabilities above. |       | Mid-year     Final      | Mid-year     Final      |      1. Needs Improvement     2. Nearly Achieves Performance Expectations     3. Achieves Performance Expectations     4. Significantly Exceeds Performance Expectations |

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| **Section** | **Weight** | **Rating****Mid-year End Year** | **Opportunities for Development** |
| **Values** | 0.25 |  |       |
| **Competencies** | 0.25 |  |       |
| **Job Accountabilities** | 0.5 |  |       |
| **Final Rating** |       |  | **Training Needs:****Career Opportunities:** |

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|      1. Needs Improvement |      2. Nearly Achieves Performance Expectations |      3. Achieves Performance Expectations  |      4. Significantly Exceeds Performance Expectations |
| * Does not meet the minimum requirements of the position
* Did not perform job at a satisfactory level
* A performance plan is required
 | * Met some job requirements but not consistently
* Development is required to consistently meet minimum standards
 | * Consistently met the requirements of the job in all aspects
* Very few areas for improvement or development needed at this level
 | * Performance consistently exceeded standards and expectations in all aspects of the job
* Includes unique and exceptional accomplishments
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| **Signatures**Your signature below does not necessarily signify your agreement with the appraisal; it simply means that the appraisal has been discussed with you. |
| **Performance Planning and Goal Setting Discussion**Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Manager Signature (completed by): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Second Level Manager’s Signature (reviewed by): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Mid-year Review Discussion**Employee’s Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Manager’s Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Year End Review Discussion**Employee’s Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Manager’s Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Department Director’s Signature and Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Job Description up to date? Yes No |
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| **HR Section** Notes: Final Rating: \_\_\_\_\_\_\_\_\_\_\_\_Payroll adjustment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Training Identified: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |