Performance Management Program

User’s Manual
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**Introduction**

Bentley University utilizes an online performance management system for most staff, the Performance Management Program (“PMP”). The PMP is the culmination of a three-year transition from a manual “check the box” form, to an automated performance management system that utilizes a competency-based model tailored to Bentley’s needs. The PMP improves upon the manual competency-based format by eliminating the need for manual calculations, secondary reference materials, and repetition, while staying true to the original concept.

While most staff will utilize the PMP, staff in the Athletics Department and Union employees will be reviewed utilizing manual forms found online at [http://www.bentley.edu/offices/human-resources/performance-appraisals](http://www.bentley.edu/offices/human-resources/performance-appraisals).

**The Performance Management Cycle**

Performance management consists of ongoing feedback and discussion throughout the course of the year, with a formal review at the close of each cycle. Bentley utilizes two performance management cycles. Most departments conduct performance appraisals on the *Calendar Year Cycle*. Reviews for this cycle commence on January 1, reviewing performance for the previous calendar year (January 1 to December 31), and creating goals and a development plan for the coming calendar year.

Some departments conduct reviews on a *Fiscal Year Cycle*. Reviews for this cycle commence on July 1, reviewing performance for the previous fiscal year (July 1 to June 30), and creating goals and a development plan for the coming fiscal year.

**Timeline—Calendar Year Cycle**

<table>
<thead>
<tr>
<th>January-February</th>
<th>Review Employee Self-Appraisal and Conduct Formal Review</th>
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<tbody>
<tr>
<td></td>
<td>Set Goals and Create Development Plan</td>
</tr>
<tr>
<td>February-June</td>
<td>Monitor Progress and Provide Feedback</td>
</tr>
<tr>
<td>Throughout the Year</td>
<td>Adjust Goals as Needed</td>
</tr>
<tr>
<td>June-July</td>
<td>Conduct a 6 month Check-in to Discuss Progress</td>
</tr>
<tr>
<td>July-December</td>
<td>Monitor Progress and Provide Feedback</td>
</tr>
</tbody>
</table>
**Timeline—Fiscal Year Cycle**

<table>
<thead>
<tr>
<th>Period</th>
<th>Activities</th>
</tr>
</thead>
</table>
| **July-August** | Review Employee Self-Appraisal and Conduct Formal Review  
|                 | Set Goals and Create Development Plan            |
| **August-December** | Monitor Progress and Provide Feedback            |
| **Throughout the Year** | Adjust Goals as Needed                          |
| **December-January** | Conduct a 6 month Check-in to Discuss Progress |
| **January-July** | Monitor Progress and Provide Feedback            |

**System Overview – Accessing the Performance Management Program**

**Accessing the PMP**

The system will be accessible for the 8 week appraisal period for your cycle. At the commencement of your appraisal cycle, you will receive an email containing a link to the system. You may begin your reviews immediately upon receipt of the link. You do not need to wait for your direct reports to complete their self-appraisals in order to begin preparing their reviews.

**Login/Logout**

In order to access the system, you will be prompted to sign in utilizing your Bentley username and password. This is the same username and password you use to access my.bentley. Once you have logged in, the system does have a timeout feature for security purposes. You will be prompted to extend your time in the system if there has been no activity for several minutes.
Manager’s Screen
Once you have logged in, you will be able to access your reviews by clicking “Current Appraisals under the Managers heading in the menu on the right.

You will be taken to a list of your direct reports. You may open the appraisal of the selected direct report by clicking Open Appraisal in the dropdown Actions menu.

Components of the Performance Appraisal and Development Plan
The PMP consists of a Competency Review, a Goals Assessment, a Narrative, Future Goals, and a Development Plan.

Competency Review
The Competency Review includes a review of three (3) Bentley Citizenship competencies that apply to all Bentley staff, five (5) Targeted competencies that apply to all staff within a shared job family, and up to two (2) optional role-specific competencies that apply to individual employees. The role-specific competencies can be removed or changed if desired.
Rating

Each competency can be rated Needs Improvement, Needs Improvement +, Proficient -, Proficient, Proficient +, Highly Effective -, Highly Effective, Highly Effective +, Outstanding -, and Outstanding. The ratings can be chosen by moving the icon on the slider scale. By clicking
the question mark, you can view a graphic displaying the rating for each tick. The ratings for the competencies and the goals assessment will be averaged to determine an overall performance category: Needs Improvement, Proficient, Highly Effective, Outstanding.

Goals Assessment
The Goals Assessment is an opportunity to rate progress toward the previous year’s goals. If the previous appraisal was completed using the PMP, the “Future Goals” from the previous year will pre-populate here. Otherwise, they must be manually filled.
Narrative
The Narrative is an optional section in the review to be used as space for a free-form discussion about performance or clarifying points within the competency review or Goals Assessment.

Future Goals
The Future Goals section offers an opportunity to provide your direct report with goals for the coming year. Click Add Goal for each goal you would like to enter.

Development Plan
You may enter items such as webinars, HR trainings, stretch assignments, on-campus trainings, conferences, or other opportunities that you feel would provide useful skills. Your direct report may have aspirations that s/he has not shared with you, so be sure to ask!

Review and Finish
Once you have completed the review, you may review a summary of the ratings in the Review and Finish Tab. Here you are able to see the overall rating, and adjust individual ratings. You may even click on an individual competency to link back to that competency’s comment box in order to make adjustments.

NOTE: Be sure to save as you move from one tab to the next to avoid losing any unsaved information!

Additional Features
The components of the review, goals assessment, and development plan are divided among several tabs. The tabs can be completed in any order. The system will prompt you to complete an item if you inadvertently skip a section.

Self Appraisals
You will be able to access your direct reports’ self-appraisals if they have been completed. You may cut and paste from the self-appraisal into the system, or from other documents such as previous reviews, memos, etc.
Print/Export
You may also print/export the review and email it to others for feedback. For example, you may wish to discuss comments with a co-manager, or the manager to whom you report. Simply click Print/Export and a popup will offer you the option of sending the document in PDF format, or a text version that can be copied into an email.

Dev Plan Lightbulb
If you are in the process of working in one tab, and you think of a development opportunity for your direct report, you need not leave the tab in which you are working. You may instead click the Dev Plan lightbulb at the top of the review and Add your idea in the popup. This idea will appear automatically in your Development Plan tab when added and saved.

Required Items
Some items are required before signing the review. The system will notify you if there are any items missing, and prompt you to correct any deficiencies:

1. Any item with a Needs Improvement rating must contain a comment
2. The PMP does not require comments ratings of Proficient or higher; however, the system will not allow you to sign an appraisal that contains no comments or discussion whatsoever.
3. At least one future goal is required
4. At least one item in the Development Plan is required.

E-Signatures and Approvals

After you have completed an initial draft of the review, schedule a time to discuss the review with your direct report. You may either send it to your direct report through the system by clicking Send to Employee, or you may choose instead to email a PDF using the print/export button within the system. You may also choose to provide the employee with a hardcopy review during the scheduled discussion rather than providing it in advance. Using any of these methods, you will still be able to edit the appraisal should changes be needed.

Once you are satisfied that the appraisal is complete, click Send to Employee if you have not done so already, and then click Sign. The system will prompt for your e-signature. ONCE YOU HAVE SIGNED, NO FURTHER CHANGES CAN BE MADE. The system will automatically generate an email to your direct report to sign the review.

NOTE: If the overall rating of the review is Needs Improvement, the system will also generate an email to your manager prompting for a signature.
Once all signatures have been obtained, you will receive an email prompting you to sign in and submit the review to HR.

**Additional Information about Performance Management**

Trainings will be offered every cycle on the PMP system and on performance management. Please watch for emails from HR Learning and Development.