

**University of Detroit Mercy**  
**Performance Communication System (PCS)**

**Supervisor Manual**

**University of Detroit Mercy**  
**Performance Communication System (PCS)**

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**Supervisor Manual**

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## University of Detroit Mercy Performance Communication System (PCS)

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### **What is the Performance Communication System (PCS)?**

The Performance Communication System (PCS) is designed to help employees understand their roles and expectations and participate in the improvement of the University of Detroit Mercy through improved communication. The substance of the program is trust in employees and honest communication between employees and supervisors. While this new system addresses the need for improvement of the former appraisal system, it more importantly takes into consideration traditional belief systems about performance appraisal, how employees work, and what inspires employees. As a result, the PCS more clearly emphasizes the following philosophical assumptions about UDM:

- ❖ UDM employees want to work, do a good job, and do their fair share.
- ❖ Within the scope of their positions, UDM employees should be allowed to do the jobs they are capable of doing.
- ❖ Motivation to contribute and achieve requires a sense of purpose and recognition for such contributions.
- ❖ Supervisors and those who report to them can and should learn from each other about improving best practices while improving the culture of the workplace.

### **The Objectives of the Performance Communication System are:**

- ❖ **To align perspectives on performance with expectations**  
Communication between the employee and supervisor will include discussion about job-related tasks.
- ❖ **To link individual employee performance and goals to the University's priorities**  
Communication between the employee and supervisor will include clarification of job responsibilities in the context of larger organizational goals. An employee's development may be related to either current or future positions, and should be continuous to ensure that UDM is able to respond to its dynamic environment.
- ❖ **To engage in open, honest, direct and ongoing dialogue in regard to performance**  
Dialogue between an employee and supervisor will be continuous and include coaching and guiding.
- ❖ **To create guidelines outlining the standards for effective performance communication**  
The Performance Communication tools are designed to guide communication about performance and development by providing an outline for important discussion points.

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### **The PCS supports the University's Mission through:**

❖ **Connecting employee performance to the learning community (UDM) where:**

- **Knowledge improves lives**
- **Faith inspires justice and sensitivity**
- **Service forms tomorrow's leaders**

The dialogue between the employee and supervisor will take account of how the employee conducts him/herself with coworkers, the UDM community and with the community at large. The discussion will explore what it means to "live out the mission" in daily activities and attitude, with a focus on how they contributed to and supported the University Mission and Identity.

❖ **Providing a framework to foster a UDM culture of work grounded in mutual respect.**

The PCS process emphasizes leading and empowering employees.

❖ **Creating a process to promote two-way feedback in the workplace for the ongoing development of all staff and the expression of innovative ideas to achieve excellence.**

Employees and supervisors are partners in this discussion and should approach PCS conversations expecting to learn from one another (i.e., to leave a conversation thinking differently than when one began it). Both should listen, ask questions as appropriate, be patient, and allow adequate time to convey their thoughts.

### **How is the Performance Communication System different?**

The PCS is not a traditional performance appraisal program. It is not a quantitative system but rather a foundation that facilitates ongoing dialogue between employees and supervisors about performance. The PCS also differs from traditional programs in that formal written communication is de-emphasized, and limited information is placed in the Human Resources personnel file.

### **How to get started . . .**

As a general rule it is advised that supervisors take into consideration input from others in regard to the employees' performance including areas of concern and highlighting outstanding performance. The supervisor will schedule a semiannual performance discussion with the employee. Employees are encouraged to initiate the meeting if supervisor is not timely. Prior to the discussion, the employee will complete the Employee Self-Assessment Worksheet; the supervisor will complete a summary of the employee's performance since the last formal discussion addressing each of the discussion points on the Performance Communication Discussion Form. Before the performance discussion, the supervisor and the employee should have already discussed the job description questionnaire, performance standards, and departmental goals. These and other documents relevant to the employee's performance should be on hand during the discussion.

In addition to the semiannual performance discussions described above, supervisors are to hold these discussions at one and one-half and three months during a new employee's orientation period.

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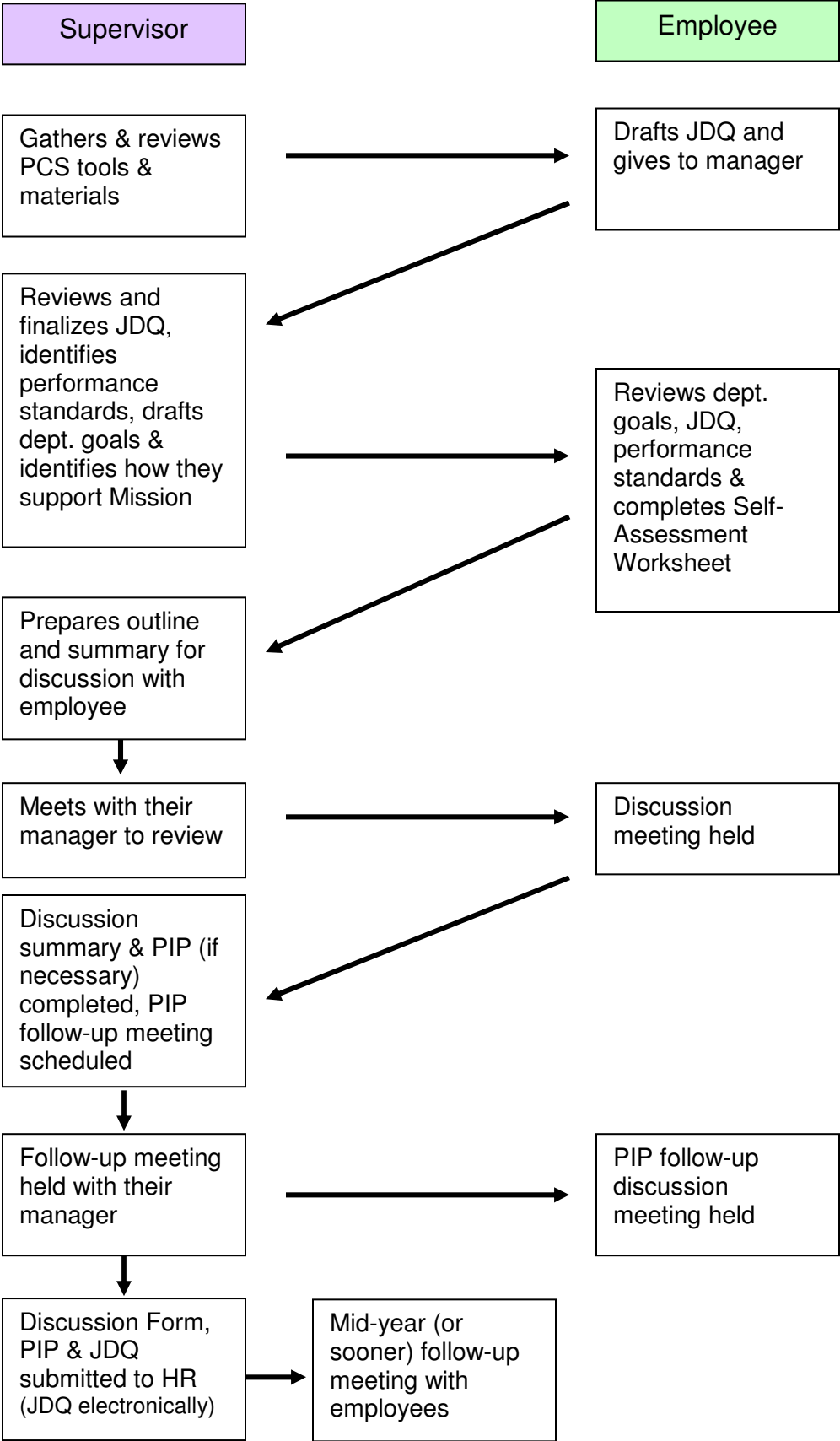
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### **The Process**

- ❖ Supervisor gathers and reviews the PCS tools and supporting materials.
- ❖ Employee drafts/updates Job Description Questionnaire (JDQ) and gives it to their supervisor.
- ❖ Supervisor reviews and finalizes JDQ, identifies performance standards, drafts departmental goals and identifies how they support the University Mission.
- ❖ Employee reviews JDQ, performance standards, departmental goals, completes Self-Assessment Worksheet and gives it to their supervisor.
- ❖ Supervisor prepares an outline and summary of what will be discussed with the employee.
- ❖ Supervisor meets with their manager to discuss the employee's overall performance.
- ❖ The performance discussion meeting is held.
- ❖ A written summary of the discussion is given to the employee.
- ❖ Performance Improvement Plan (PIP) is completed, if required, and follow-up meeting with employee scheduled.
- ❖ Supervisor meets with their manager to verify that the process has been completed and discuss the Self-Assessment Worksheet, the discussion outline, any supporting documentation, the signed Performance Communication Discussion Form, the discussion summary, and the Performance Improvement Plan (if required). This paperwork is turned over to their manager.
- ❖ If in agreement, manager signs Performance Communication Discussion Form, copies this and any PIP for the supervisor, forwards the originals of the PCDF and PIP to HR (for the employee's file), and returns all remaining documentation to the supervisor.
- ❖ The Job Description Questionnaire is transmitted electronically to HR.

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### **Preparing for the Discussion Meeting**

The following items should be reviewed prior to the discussion meeting:

- \_\_\_ Job Description Questionnaire
- \_\_\_ Self-Assessment Worksheet
- \_\_\_ Departmental goals
- \_\_\_ Performance expectations
- \_\_\_ Behavioral competencies

### **Tips for Good Communication**

- ❖ Plan the meeting in advance – Both the supervisor and the employee should be allowed time to prepare
- ❖ Bring notes and any other documentation
- ❖ The meeting should take place in a private setting, free from interruptions
- ❖ Be objective; give factual and specific information
- ❖ State your information clearly
- ❖ Listen! Be patient and allow the other party time to respond and convey their thoughts
- ❖ Ask questions to seek understanding, and paraphrase if necessary
- ❖ Don't be defensive
- ❖ Convey your thoughts in a respectful manner
- ❖ Provide encouragement when appropriate
- ❖ Summarize the discussion



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### **Performance Expectations**

#### **Job Effectiveness**

- ❖ Demonstrates planning and organizational skills
- ❖ Demonstrates problem solving skills and good judgment
- ❖ Communicates effectively
- ❖ Makes effective decisions
- ❖ Takes responsibility
- ❖ Achieves results
- ❖ Demonstrates dependability and good attendance
- ❖ Demonstrates knowledge of the job and the organization
- ❖ Maintains productivity
- ❖ Demonstrates flexibility and adapts to change
- ❖ Demonstrates leadership and initiative
- ❖ Recognizes others' achievements
- ❖ Resolves conflicts constructively
- ❖ Displays positive attitude

#### **Customer Service Standards**

- ❖ Creates a positive first image
- ❖ Listens to customers and understands their needs and concerns
- ❖ Maintains a high level of professionalism and confidentiality
- ❖ Approaches each interaction with a positive attitude
- ❖ Provides helpful assistance in a sincere way
- ❖ Responds in a timely and accurate manner
- ❖ Checks to see if further assistance is needed and follows up as necessary
- ❖ Treats colleagues as customers

#### **Additional Factors for Supervisors**

- ❖ Coaches/counsels/evaluates staff
- ❖ Identifies areas for and supports employee development opportunities
- ❖ Encourages teamwork and group achievement
- ❖ Leads change/achieves support of objectives
- ❖ Enables and empowers staff
- ❖ Strives to achieve diverse staff at all levels
- ❖ Understands diversity issues and creates a supportive environment for diverse employees
- ❖ Communicates openly and honestly
- ❖ Recognizes individual and group achievements

### **The UDM Mission**

The University of Detroit Mercy, a Catholic university in the Jesuit and Mercy traditions, exists to provide excellent student-centered undergraduate and graduate education in an urban context. A UDM education seeks to integrate the intellectual, spiritual, ethical and social development of our students.

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### **Behavioral Competencies**

Standards of conduct encompass knowledge, skills, attitudes, and actions that distinguish excellent performers. The following behavioral competencies should be considered during performance review discussions. Other competencies, which are specific to your unit's strategic plan or the employee's development plan, may also be used.

#### **Excellence**

- ❖ Strives for excellence through developing and demonstrating innovation in the performance of responsibilities.
- ❖ Complies with legal standards, adheres to University policies and lives morality beyond legality.
- ❖ Solves problems and supports members of the University community during difficult times.
- ❖ Asks questions and seeks assistance when the proper course of action is uncertain.
- ❖ Engages in free, active and original intellectual inquiry.

#### **Conscience**

- ❖ Cultivates the formation of one's conscience which honors the dignity of the whole person.
- ❖ Demonstrates conscience through honesty, integrity, and morality in every situation.
- ❖ Values inter-religious collaboration and respects the faith of diverse religious communities.
- ❖ Deepens one's own belief and wrestles with the ethical questions which emerge in one's work place.

#### **Compassion**

- ❖ Shows compassion through patient understanding of other people in different situations.
- ❖ Practices compassion by listening, seeking first to reflect and understand before making decisions and taking action.
- ❖ Demonstrates selflessness when interacting with others.
- ❖ Seeks forgiveness when appropriate.

#### **Community**

- ❖ Respects the dignity of others.
- ❖ Promotes dialogue and decision making which addresses ignorance, injustice, poverty, racism, and educational needs.
- ❖ Works to build teamwork and a healthy balance of playfulness with focus on task.
- ❖ Offers mutual support.
- ❖ Welcomes all members regardless of racial, ethnic, or religious backgrounds.

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### **Using the Performance Communication Discussion Form**

(What supervisors and employees will discuss)

During the performance meeting, the supervisor and employee will discuss the topics listed on the Performance Communication Discussion Form. Open, two-way communication is important. Both the employee and supervisor should be sure to ask questions to clarify points they do not completely understand.

### **Performance Discussion**

**1 & 2. Discuss the employee's performance on primary responsibilities and priorities, performance standards, expectations, and goals, since the last appraisal.**

During the semiannual performance discussion, the employee's effectiveness in performing his or her responsibilities and addressing priorities should be thoroughly discussed. Discuss how the employee performed against the expectations, standards and goals that were outlined. Then, the responsibilities and priorities, expectations and goals should be updated as needed for the coming year, or confirmed as unchanged. Job responsibilities, priorities and goals may change throughout the year, and should be discussed as they change.

**3 & 4. Discuss the employee's customer service performance and how the employee "lives the University Mission".**

Discuss the employee's performance in regard to "Living the Mission". These discussion points focus on how the employee performs the job rather than on what the job responsibilities are. The University Mission, our Jesuit and Mercy traditions, Performance Expectations and Behavioral Competencies serve as initiators for the discussion. They include the Shared Values for the Common Good and customer service standards that describe individual behaviors that are important to effective work performance.

A discussion about living the mission would include how employees treat all stakeholders with warmth and respect (i.e., colleagues from one's own unit; colleagues from other areas within UDM; students; people who approach UDM from outside the university). In particular, a department with colleagues who treat one another with respect is better able to provide service to students, patients, other employees, and the community. Discussing how the various factors can be displayed in different jobs can be an important part of the discussion and may help employees and supervisors broaden their view of jobs at all levels.

Employees will be asked to reflect on how they contributed to and supported the University Mission and Identity by selecting three items from the following list as a starting point: Research, Teaching, Service, Catholic, Jesuit & Mercy, Urban, Student-Centered. Assistance from the supervisor on how to articulate this may be needed at times.

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**5 & 6. Discuss the employee's strengths and areas for growth and improvement in critical performance factors.**

These discussion points focus on what skills and attributes an employee brings to the job and how the employee meets the challenges the job requires. The Performance Expectations and Behavioral Competencies serve as initiators for the discussion. Growth and improvement goals should relate to the current position.

**7. Discuss barriers to effective work performance and job satisfaction.**

Employees know their jobs better than anyone and consequently are in the best position to identify barriers that limit their ability to perform effectively. Employees should describe these barriers (for example, resources, systems, or processes surrounding their work) to their supervisors along with possible ways of eliminating them. Employees can also identify their satisfaction in performing various duties, which provides an opportunity to explore options for matching assignments to particular employee strengths and areas of interest.

**8. Discuss possible work process improvements.**

Increasing service demands have necessitated greater and greater employee effort. In many cases, however, the best way to respond to increasing demands is to rethink the process by which a service is delivered. Once again, since employees are closest to the work and to those being served, they are the best source of ideas on how processes can be improved. Questions to answer in discussing process improvements include:

- ❖ Who is being served by the process and what do they want?
- ❖ How can the process be improved?
- ❖ Can steps be simplified or consolidated?
- ❖ Can work that does not add value to the department mission be eliminated?
- ❖ Can people be more broadly trained to provide more effective service?
- ❖ Is redundant work occurring?

**9. Discuss the employee's development.**

Employees must continually improve existing skills and develop new ones to ensure continued effectiveness. In this part of the discussion, employees and supervisors can define a specific course of action to:

- ❖ Enhance current skills
- ❖ Develop new skills
- ❖ Broaden knowledge
- ❖ Improve a deficient area

Development is a joint responsibility of employees and supervisors. The first priority is to ensure training and development of the employee's skills when they are required for the employee's current position. Employees should take the lead in seeking career advancement. The career development portion of this discussion provides an important opportunity for the supervisor to give an honest assessment of the employee's preparedness for desired career growth, as well as development the supervisor believes would help the employee in attaining his or her goals. If additional career planning

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support is needed, the supervisor can refer the employee to Human Resources (993-1036) for more information about various resources available on campus.

**10. Discuss how the employee continues to grow to meet future needs and demands of a changing environment.**

This discussion item relates directly to the employee development item above, and is intended to address specifically the adequacy of the employee's development and response to changing work demands. Clear feedback on this item is crucial to both the employee's and UDM's success. Failure to meet this challenge can result in skill obsolescence and organizational mediocrity. This discussion might focus on:

- ❖ What growth the employee has accomplished and how that has supported the department's needs.
- ❖ The department's long-term plans and how the employee will need to contribute to these goals, along with related development needs.
- ❖ How well the employee responds to feedback and change.

**11. Discuss the employee's feedback and constructive suggestions on ways his or her supervisor can better assist in his or her development.**

It is important for the employee to have an opportunity to give feedback about the guidance and support provided by the supervisor and to make constructive suggestions that will enable the employee to do a better job. It is also a chance for an employee to share positive comments about the supervisor's support.

**12. Discuss other work-related topics.**

Too often supervisors and employees have little time together to talk about many work-related matters, concerns, or interests. This item provides an opportunity to bring up issues needing discussion but for which time has not been available.

**13. Discussion Summary**

The written discussion summary should reflect the discussion that was held, which should include performance objectives, development, and goals.

### **Where to add employee and supervisor comments**

The employee and supervisor may attach written comments. These may be complimentary remarks, notes of special accomplishments, areas where improvement is needed, or other evaluative statements.

Under the University's former appraisal system, high ratings served as a form of recognition for many employees. Because those ratings are absent in the Performance Communication Discussion Form, supervisors are encouraged to recognize high levels of performance in the comments section, or through more formal letters of recognition, ongoing feedback, etc.

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### **Determining whether an employee meets expectations**

Supervisors are to indicate whether, overall, the employee meets the minimum expectations of his or her current position. This assessment should take into consideration total performance. Weaknesses in a few aspects of a job may or may not result in an employee's failure to meet expectations overall. It will depend on the significance of the factor to the job and the magnitude of the deficiency. To discuss specific situations, contact Human Resources.

Most employees will meet expectations; however, some will not. For employees who do not meet expectations, a more formal and detailed Performance Improvement Plan (PIP) is required, as well as follow-up discussions and another review within 30, 60 or 90 days from the PCS discussion date, dependent on the severity of the issue(s) and whether or not the employee is new and within the orientation period. This additional process is intended to provide clear information on required improvements and determine the support that will be provided to assist the employee to improve. PIP forms are available through Human Resources.

Performance development discussions and Performance Improvement Plans are not replacements for the disciplinary process throughout the year. If an employee does not meet expectations, they should receive corrective counseling.

### **Once the PCS discussion is complete**

Upon completion of the PCS discussion, the supervisor forwards the following documents to the next level of management for signature and meets with the manager regarding them:

- ❖ The Employee Self-Assessment Worksheet
- ❖ Supervisor's prepared discussion outline
- ❖ Any supporting documentation
- ❖ The signed Performance Communication Discussion Form
- ❖ The discussion summary
- ❖ Performance Improvement Plan

By signing off, the manager agrees with the supervisor's assessment of the employee's performance. The manager will forward the original Performance Communication Discussion Form and Performance Improvement Plan to HR and return a signed copy of the Performance Communication Discussion Form, a copy of the PIP, and the other documents to the supervisor. The supervisor will copy the documents for the employee and retain a copy for his/her own department file. The Discussion Form and any PIP will be placed in the employee's HR file. Human Resources will follow-up on overdue reports with department heads to ensure that all employees are having performance discussions. Since there is very little evaluative content in the Performance Communication Discussion Form, supervisors considering internal candidates for transfers are, as in the past, encouraged to call employing departments for reference information when hiring.

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### **PCS Discussion Schedule**

Performance communication discussions for regular employees are completed before the end of the orientation period and on a semiannual basis, unless more frequent reviews are deemed necessary by the department (i.e., as in the case of new employees or those with Performance Improvement Plans in place). Typically, the President's Council, in consultation with HR, will decide the timing of the annual semiannual performance discussions

### **Location of the PCS forms**

The PCS forms can be obtained from the Human Resources Department. To request an electronic copy, e-mail [hr@udmercy.edu](mailto:hr@udmercy.edu). The Job Description Questionnaire is posted on the HR website ([www.udmercy.edu/hr](http://www.udmercy.edu/hr)).

### **The Supervisor's Role and Accountability**

An employee's immediate supervisor, who usually has primary responsibility for the employee's hiring, development, assignment of work, etc, conducts the PCS process. If such a supervisory relationship does not exist, the department administrator should assign the responsibility to the administrator/supervisor who is most knowledgeable about the employee's job duties and performance. In cases where a person works for a group of individuals, one person should be designated as the official supervisor. That person should obtain input from the others for whom the employee supports and should conduct the performance discussion. In rare cases, an employee may have more than one supervisor and discussion because he or she works in two distinct positions. In cases where a lead worker (i.e., someone who coordinates and monitors work but does not have the authority to hire or evaluate) has been designated, the supervisor may use the lead worker's input regarding the employee's work performance, but the lead worker is not part of the performance discussion.

It is a supervisor's responsibility to follow the PCS process by conducting timely and thoughtful performance communication discussions. These semiannual performance discussions are not optional. Annual decisions on supervisors'/administrators' merit pay will take this responsibility into account.

### **Documentation/Reasons for Personnel Actions**

The PCS reduces the formal paperwork, but it is still important that the department maintains accurate and factual supporting documentation. In cases where an employee does not meet minimum expectations, it is required that a Performance Improvement Plan form be completed and related documentation retained in the HR personnel file.

A written summary of the employee's responsibilities and priorities is given early on. This summary does not have to be redone every year if it does not change. Although the PCS does not require that the content of the performance discussion be written in full, supervisors and employees confirm key points in writing. Typically, these documents will be retained in the department supervisor's employee files. Departments are reminded that they are to have

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concrete reasons for taking various personnel actions such as hiring, promoting, and awarding merit pay. When making differential judgments about employees/candidates, supervisors should be prepared to share the specific, factual, and objective job-related reasons for making those decisions.

In addition to pay, there may be other ways to reward or recognize exceptional or outstanding performance. Supervisors are encouraged to explore this with their outstanding employees. Supervisors should not assume that what they view as a reward is necessarily how their employees see it. To better match the individual's values, ask each employee what motivates them.

### **Where to go for Assistance**

The Human Resources consultants are available to meet with staff and supervisors at the department level to explain the PCS or to answer specific questions. An employee with concerns about his or her experience in a performance discussion should first try to discuss them with his or her supervisor. If they cannot be resolved, they may be discussed with the department administrator. If assistance is needed, contact one of the following HR consultants:

Netina Anding  
993-1445

Karen Martin  
993-1520

Maria Campbell  
993-1609

Steven Nelson  
993-1524



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**Supervisor's PCS Discussion Outline**

1. Discuss employee's performance on primary responsibilities/priorities, expectations, performance standards, and goals in the past 6 months. *(A written summary of responsibilities/priorities/job description questionnaire, and performance standards should have been previously provided to the employee.)*
2. Review and discuss how employee's performance related to overall department/division goals.
3. Discuss employee's customer service performance.
4. Discuss how employee contributed to and supported the University Mission and Identity.
5. Discuss employee's strengths and exceptional contributions.
6. Discuss employee's areas for improvement.
7. Discuss barriers to effective work performance and job satisfaction.
8. Discuss potential work process improvements.
9. Discuss employee's development. *(During review period; future needs for current job; long term career goals and development needs to achieve them).*
10. Discuss how employee continues to grow to meet future needs/demands of the changing environment.
11. Discuss employee's feedback/constructive suggestions for supervisor.
12. Discuss other work related topics/items not covered elsewhere in the PCS.
13. Discussion Summary
14. Additional factors for supervisors only

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**Performance Communication Discussion Form**

Employee:	Clock #:
Job Title:	
Department:	Meeting Date:
This form is to document that the following topics have been discussed semiannually (2 times per year). Supporting documentation should be retained in the department by the supervisor.	
<b>DISCUSSION POINTS</b> (Use the highlighted points for a new employee's 3-month evaluation)	Check Off When Done
1. Discuss employee's performance on primary responsibilities/priorities, expectations, performance standards, and goals in the past 6 months. <i>(A written summary of responsibilities/priorities and performance standards and the job description questionnaire should have been previously provided to the employee.)</i>	<input type="checkbox"/>
2. Review and discuss how employee's performance related to overall department/division goals.	<input type="checkbox"/>
3. Discuss employee's customer service performance.	<input type="checkbox"/>
4. Discuss how employee contributed to and supported the University Mission.	<input type="checkbox"/>
5. Discuss employee's strengths and exceptional contributions.	<input type="checkbox"/>
6. Discuss employee's areas for improvement.	<input type="checkbox"/>
7. Discuss barriers to effective work performance and job satisfaction.	<input type="checkbox"/>
8. Discuss potential work process improvements.	<input type="checkbox"/>
9. Discuss employee's development (during review period; future needs for current job; long term career goals and development needs to achieve them).	<input type="checkbox"/>
10. Discuss how employee continues to grow to meet future needs/demands of the changing environment.	<input type="checkbox"/>
11. Discuss employee's feedback/constructive suggestions for supervisor.	<input type="checkbox"/>
12. Discuss other work related topics/items not covered elsewhere in the PCS.	<input type="checkbox"/>
<b>13. Employee was provided with a brief written summary of points discussed, including goals and responsibilities/priorities for the next 6 months.</b>	<input type="checkbox"/>
<b>FOR SUPERVISORS/MANAGERS ONLY</b>	
14. Discuss "Additional Factors for Supervisors" (Performance Expectations)	<input type="checkbox"/>
<b>Employee meets current expectations</b>	Yes <input type="checkbox"/> No* <input type="checkbox"/>
<b>*If No, completed Performance Improvement Plan is required and is attached to this form.</b>	<input type="checkbox"/>
<b>These topics have been discussed and a summary was provided by:</b>	
_____	_____
<b>Employee Signature and Date</b>	<b>Supervisor Signature and Date</b>
I have reviewed the documents related to this employee's performance and agree with the supervisor's overall assessment _____	
Print name of next level of supervision	Requires Signature and Date

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Please provide any comments below. Attach additional sheets as necessary.

Supervisor Comments:

Employee Comments:

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Performance Improvement Plan (PIP)**

*Supervisor/Manager – After meeting with your employee to discuss the issue, please complete this form as a record of your discussion. Attach any other relevant documentation. You may make revisions to this form and/or use separate sheets of paper.*

Date: \_\_\_\_\_  
Employee Name: \_\_\_\_\_  
Employee Title: \_\_\_\_\_  
Supervisor Name: \_\_\_\_\_  
Supervisor Phone #: \_\_\_\_\_

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**Please ensure that the following agenda items are covered in your Performance Improvement Plan discussion:**

- ❖ Identify the specific performance issue(s).
- ❖ Discuss the impact of the issue(s) on the department and the University.
- ❖ Obtain the employee’s feedback.
- ❖ Discuss expected behavior or performance.
- ❖ Discuss developmental objectives (include internal/external resources necessary to influence improved performance and outcomes).
- ❖ Discuss action steps that will be taken by the employee.
- ❖ Discuss action steps that will be taken by you, the supervisor.
- ❖ Discuss a resolution.

---

Next formal review discussion date \_\_\_\_\_  
*[depends on severity of issue(s)]*

State the consequences for substantial lack of improvement:

\_\_\_\_\_  
\_\_\_\_\_

Summary of meeting and above agenda items:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



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**Employee Self-Assessment Worksheet**

Please complete this worksheet in preparation for your performance discussion with your supervisor. This worksheet will be retained by your supervisor and will not be a part of your file in Human Resources.

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Title: \_\_\_\_\_ Department: \_\_\_\_\_

1. Upon reviewing your job responsibilities, describe how you fulfilled the expectations of your job.
  
  
  
  
  
  
  
  
  
  
2.
  - a. List your contributions to achieving the overall goals of your department/division.
  
  
  
  
  
  
  
  
  
  
  - b. List how you achieved your individual goals. If you did not achieve them, state why not?
  
  
  
  
  
  
  
  
  
  
3. Describe your contributions to improving customer service/satisfaction in your department and to the University (consider Performance Expectations and Behavioral Competencies).
  
  
  
  
  
  
  
  
  
  
4. How did you contribute to the University's Mission and Identity? Select three (3) items from the following list and detail how your contributions related to them: Research, Teaching, Service, Catholic, Jesuit & Mercy, Urban, Student-Centered
  
  
  
  
  
  
  
  
  
  
5. List exceptional contributions and/or those beyond the scope of your job you have made to your department since the last performance discussion.

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6. List areas of your performance you would like to improve.
  
7. Identify notable obstacles you encountered in accomplishing your job responsibilities since the last performance discussion (if applicable) and some possible solutions.
  
8. Identify any ideas that could improve your job, work area, or department.
  
9. Describe what actions you took toward your development since the last performance discussion (if applicable).
  
10. What areas do you need (want) to develop? How will you achieve this?
  
11. What can your supervisor do to better assist you in your position and in your development?
  
12. Add any additional information that you wish to have considered. (Attach separate sheet if needed.)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_