
Frequently Asked Questions PDS – 2017

Performance Development System (PDS)

Performance Development Plan (PDP)

Orgchart – Temple University’s electronic hierarchy which controls supervisor access to an employee’s PDP

1. Would a PDP ever be locked?

Supervisors may choose to lock PDPs after Essential Functions, Goals and Projects, and Competencies have been established and added to a PDP. This ensures that no change is made to items that have already been established and agreed upon.

However, the Comments sections are always open for input from the employee until the time that the PDP is submitted to HR at the end of the fiscal year in June.

2. How is the final score calculated?

The system has an algorithm that assigns a value to each of these ratings:

- Significantly exceeds expectations
- Exceeds expectations
- Meets expectations
- Partially meets expectations
- Does not meet expectations

The final score is a combination of the following:

- Essential Functions - 40%
- Goals and Projects - 40%
- Competencies - 20%

3. Who should start my PDP - me or my supervisor?

PDPs can be started by an employee or by an employee’s supervisor. Ideally, supervisors should start the PDP for new employees and then follow up with a meeting to discuss expectations.

If a supervisor has not/does not start an employee's PDP, then the employee should be proactive in starting his/her PDP. The employee should then share the PDP with the supervisor to ensure that the supervisor is in agreement. This helps to set expectations for both people.

4. When should I add Employee Comments to my PDP?

Employees should be adding comments assessing their performance all Fiscal Year long. This ensures that no accomplishments are forgotten at year end.

5. My direct report's PDP will not compute the final rating—What's wrong?

This is almost always due to missing data somewhere in the PDP. Missing data could include:

- Supervisor comment(s) in either the PDP Details (Reviewer Comments), Essential Function, Goals/Projects, or Competency sections
- Data in either the Essential Function or Goals/Projects or Future Goals/Projects sections
- One or more unrated competencies
- Dates in either the "Date of Planning Meeting" or "Date Final Evaluation" fields

Once all of the fields mentioned above have data, the PDP will automatically present the choice to submit the PDP to the Employee.

6. My direct report has only been working for me since February – who should complete his/her PDP, me or his former supervisor?

This is a tricky one – In a perfect world, the individual who supervised the person for most of the year should complete the PDP. One way to do this is to request a temporary orgchart change so that the previous supervisor can access the PDP. The previous supervisor would then complete and rate the PDP, submit to the employee who can then review and submit to HR. At that point, the orgchart can be changed back to the current supervisor to prepare the following year's PDP.

Alternatively, the current supervisor can ask the previous supervisor for input so that both current and former supervisor contribute to the PDP.

7. My direct report started after January 1 – do they need a PDP?

All administrative employees who work twenty hours a week or more should have a PDP. The PDP is a tool to help facilitate and document clear expectations for each employee. In the case of someone who started after January 1 of any FY, a PDP should be created with Essential Functions, and Goals/Projects. The supervisor should use the PDP in order to provide feedback to the employee during their introductory period and the direct report can and should be adding employee comments documenting performance. However, when the FY ends the supervisor will not rate and submit the PDP to his/her direct report. The PDP stays in the "Work in Progress" status. When the new FY rolls over (an administrative process that makes it possible for everyone to start a new FY PDP whether the prior year's has been completed or not) the supervisor or direct report can start the new FY PDP. The appraisal that is conducted the following year will take into account the full 18 months.

8. What should I do if the Performance Development System has my supervisor or my direct reports wrong?

Temple University's Organizational Hierarchy Site provides a direct data feed into the Performance Development System (PDS), therefore, the information that is in the PDS will mirror the information that is in the Organizational Hierarchy Site. If you or your employees information is incorrect in the hierarchy system, it will need to be corrected by having the supervisor send an email to orgchart@temple.edu

9. I made a change in orgchart. When will it be reflected in the PDS?

Once an orgchart change has been made, it will be reflected in the PDS on the next business day.

10. What happens if my direct report refuses to submit his/her PDP to HR?

Human Resources considers a PDP complete as long as it has been rated, reviewed and submitted to the employee for review. The employee has the choice of reviewing and agreeing with the PDP's contents and final rating or reviewing and disagreeing with the PDP's comments and final rating. There is also a section in the PDP Details that allows the employee to make a rebuttal if the disagreement is selected. If your employee refuses to submit the PDP to HR, explain the options and inform him/her that, regardless of the decision not to submit, the information will be part of the record. We recommend that you work with your business partner to discuss the following year's PDP process to avoid the issue going forward.

11. What are the resources and or professional development programs that can help me learn about the PDS and my own PDP?

There is a PDS tutorial which describes basic functionality of the web tool. The tutorial is available on demand and is located on the menu bar of the PDS webpage.

In addition, there is a program presented via WebEx entitled, Speak Up: Taking an Active Role in your PDP which describes the philosophy and recommendations of the HR department to facilitate a productive use of the PDS.

Finally, there are two in-person instructor led programs that are produced every fall and spring which supervisors can attend to enhance their ability to supervise which includes information on effective use of the PDS and PDP. The programs are entitled, Stepping Up To Supervision (a three-hour program) and The Supervisory Development Program (a 3.5 day program that takes place over four successive weeks).