

Montgomery College

PERFORMANCE MANAGEMENT FREQUENTLY ASKED QUESTIONS (FAQS) AND IMPORTANT INFORMATION for Administrative, Associate and Support Staff

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ALL STAFF EMPLOYEES

GENERAL WAGE ADJUSTMENT, SALARY INCREMENTS AND BONUSES

1. What is the General Wage Adjustment?

- The General Wage adjustment (GWA) was previously known as a cost of living adjustment (COLA). The GWA is a percentage increase to your base salary.
- Administrators, non-bargaining associate and support staff will receive a GWA if Board of Trustees determines that there are available funds.

2. What is a salary increment and am I eligible to receive one?

- The salary increment, previously known as “merit pay,” is a percentage increase to your base salary, awarded in addition to the GWA. Salary increments are authorized by our Board of Trustees each year and the amount is dependent on available funds.
- The percentage increment is determined by the overall score of your annual performance evaluation.
- **To be eligible for a salary increment and to receive one you must meet the following criteria:**
 - a. Be in one of these eligible positions **currently and prior to January 1:**
Administrator, Chair, Staff or Temp with Benefits.
 - b. Worked for more than six month during the performance period
 - c. Receive an overall rating of three or higher on your annual performance review.

3. What are bonuses and am I eligible to receive one?

- Bonuses are one-time monetary awards and are not permanent increases to your base salary. They are reauthorized by the Board of Trustees each year and the amount is dependent on available funds.
- **To be eligible for a bonus and to receive one you must meet the following criteria:**
 - Be in one of these eligible positions **currently and prior to January 1:** Administrator, Chair, Staff or Temp with Benefits.
 - Worked for more than six month during the performance period
 - Receive an overall rating of 4 or higher on your annual performance review.

SIX-MONTH PROBATIONARY STAFF EVALUATIONS

4. I was hired within the last 12 months. Do I undergo a six-month evaluation?

The normal probationary period for newly hired staff positions is six months. This is the period of time that a new employee is required to serve in a position to demonstrate his or her knowledge, skills and ability, to perform the duties of the position satisfactorily. A recommendation to grant **Regular Employee** status must be in writing and should be submitted to Human Resources and Strategic Talent Management at least three weeks before the six-month probationary period ends. The recommendation should be made by the supervising administrator and shall specifically contain both a certification that the employee's work record is at least satisfactory and a statement that the granting of regular status is recommended. (See [Montgomery College Policies and Procedures - 33004](#)) To make the recommendation, please use the “*Six Month Staff Probationary Staff Performance Evaluation Form*” on the [HRSTM Performance Management Web Page](#).

5. I've been promoted, reclassified, assigned new duties, and/or transferred.

If a staff employee's position is reclassified (regardless of whether the salary grade changes), the staff employee will undergo a six-month probationary period and will receive a six-month evaluation. If you are unsure that your promotion, job-transfer, or change in duties constitutes a job reclassification please contacts HRSTM Classification and Compensation. CompProgramQuestions@montgomerycollege.edu

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6. Should a Temp with Benefits write a goal plan and undergo an evaluation?

For Temps with Benefits and Regular Employees to become eligible for salary increments and bonuses they must have an approved goal plan for the current fiscal year and also undergo this year's performance evaluation. Even though the decision to renew a Temp with Benefits contract may not be known until late in the fiscal year, to avoid forfeiting eligibility for increments and bonuses we strongly recommend the following actions:

The Employee

- Collaborate with your supervisor to create a [goal plan](#) for this fiscal year and submit it to your supervisor early in the year so that they can approve it by the announced deadline.
- Write a [self-evaluation](#) and submit it to the TMS by the announced deadline.

The Supervisor

- Approve the employee's goal plan by the announced deadline.
- Write the employee's performance evaluation in the TMS and submit it by the announced deadline. Please read the FAQs about [Goal Plans](#) and [Performance Evaluations](#) deadlines.

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7. Goal Plan deadlines for the goals in the upcoming performance evaluation.

For a comprehensive list of performance management deadlines for this fiscal year see "Performance Management Cycle for Administrators, Department Chairs, Associate and Support Staff" on the [HRSTM Performance Management Web Page](#).

Supervisors: See "[Am I responsible for the creation/approval of my direct report's goal plans?](#)"

8. Am I required to write a goal plan which will be included in this year's performance evaluation?

Regular Employees and Temps with Benefits hired before January 1 must have an approved goal plan for the current fiscal year and should undergo an annual performance evaluation. This is the only way for those employees to become eligible for a salary increment. In cases where employees were hired shortly before January, the 6-month probationary evaluation may take place immediately before the annual evaluation. Both evaluations should be completed.

Regular Employees and Temps with Benefits hired (completely new to the College or faculty becoming staff) on or after January 1 do not need to have an approved goal plan for the current fiscal year and will not undergo this year's annual performance evaluation. However, they will create a goal plan for the next fiscal year. It should be developed in collaboration with the supervisor while this year's performance evaluations are being written and should be initially approved by the designated deadline.

9. How many and what kind of goals must I have in my goal plan?

- We recommend having between 3 and 5 goals that are marked for inclusion in the performance evaluation.
- One of the goals must address the development and/or enhancement of cultural competency in relation to diversity and multiculturalism.

For help understanding the purpose of goal planning and the appropriate types of goals, see "*Writing Meaningful Goals*" on the [HRSTM Performance Management Web Page](#).

10. What is the Multicultural/Diversity Goal?

As part of the Diversity Plan adopted by the Montgomery College Board of Trustees, employees in all divisions, including: full-time credit and non-credit faculty, all staff (including temps w/benefits), department chairs, and administrators must have a goal plan, approved by their supervisors, that includes at least one goal that addresses the development and/or enhancement of cultural competency in relation to diversity and multiculturalism. The goal must be completed by June 30, 2015 (or within 12 months of hire/start for new employees.) This is not a requirement for part-time credit faculty or casual temporary employees without benefits.

The goal could address: A) Attending an event or short class in a new area of multicultural and diversity awareness. B) Participation in professional development classes, training or Institute. C) Taking action on a work team, committee or task force to address a diversity challenge at MC. D) Changing behaviors perceived as bias, assumption or exclusion through training, coaching, disciplinary action or other intervention. E) Completing required/mandatory training to be accountable for legal, regulatory and policy compliance on multicultural/diversity issues.

For more information please contact HRSTM – Employee Relations, Diversity & Inclusion (Laura White, 240-567-4297 laura.white@montgomerycollege.edu)

11. Retirement: I (or my report) will be retiring. Should a goal plan be written for this year?

Before retiring, the supervisor and employee should consult about the top priorities or goals of the job. This ensures a smooth transition of any tasks and duties to other staff members that may be assigned to assume them. The TMS Goals Module is a very good tool for documenting these priorities. If the retirement takes place after July 1, please read [Retirement: Should I \(or my direct report\) undergo the annual performance evaluation?](#)

12. Extended Leave: Do I need to write a goal plan for this year?

If you are on extended leave or plan to be, you can get information about your goal plan, performance evaluation and eligibility for salary increments and bonuses by contacting HRSTM – Employee/Labor Relations. **Supervisors** please read [Extended Leave: Performance evaluation and eligibility for salary increments and bonuses.](#)

13. When should next year’s goal plan be written and initially approved?

Next fiscal year’s goal plan should be a collaboration between the supervisor and the employee. When you and your supervisor are writing and reflecting on this year’s performance evaluation, you should also be discussing and developing next fiscal year’s goal plan. Your supervisor should provide the initial approval of the plan at the same time they submit this year’s performance evaluation.

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PERFORMANCE EVALUATIONS

14. Who should undergo the annual performance evaluation?

Regular Employees and Temps with Benefits hired before January 1 must have an approved goal plan for the current year and should undergo an annual performance evaluation. This is the only way for those employees to become eligible for a salary increment. In cases where employees were hired shortly before January, the 6-month probationary evaluation may be scheduled immediately before the annual evaluation. Both evaluations should be completed.

Regular Employees and Temps with Benefits hired on or after January 1 do not need to have an approved goal plan for this year and will not undergo an annual performance evaluation. However, they will create a goal plan for next fiscal year. The supervisor and employee should collaborate on the development of the plan in the spring and summer and the supervisor should initially approve the plan by the deadline for this year's performance evaluations.

You may also want to read the [Extended Leave FAQ](#)

15. Am I required to write a self-evaluation in the TMS?

Yes. All Regular Employees and Temps with Benefits are required to write self-evaluations in the TMS. Employees who fail to write self-evaluations by the announced deadlines will become ineligible for a wage increment and bonus.

NOTE: "These deadlines are collegewide system deadlines. Supervisors have authority to establish and communicate earlier deadlines if they deem it necessary in order to facilitate the timely completion of performance evaluations.

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16. Performance Evaluation Deadlines: for self-evaluation and for supervisors to submit evaluations?

For a comprehensive list of performance management deadlines for this fiscal year see "Performance Management Cycle for Administrators, Department Chairs, Associate and Support Staff" on the [HRSTM Performance Management Web Page](#).

Note: Supervisors may establish earlier deadlines to ensure timely completion of employee evaluations. Please check with your supervisor regarding your unit or team's deadlines.

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17. Required Training: Is it a part of the performance evaluation?

All employees are required to complete mandatory training and performance evaluations should reflect the employee's progress toward completion of the training.

To read about this year’s required training see “Required Training” on the [HRSTM Performance Management Web Page](#).

18. Required Training: Where do I rate and comment on it in the performance evaluation?

Since required training is a responsibility of all employees, you should evaluate progress toward completing it in the Primary Work Responsibilities section of the performance evaluation.

19. Retirement: Should I undergo a performance evaluation?

All staff (including those who plan to retire) are required to be evaluated on an annual basis. (See [College Policies and Procedures 36001 II.A.](#)). All staff are also required to write [self-evaluations](#). Supervisors are responsible for submitting the evaluations of their direct reports to the TMS by the [announced deadlines](#). Performance based salary increments and bonuses are based on the overall scores of the performance evaluations; however, in order for those salary increments and bonuses to be factored into an employee’s retirement benefits, the employee must retire “after” the increments and bonuses are paid out.

NOTE: The general wage adjustment that goes into effect on July 1 is not tied to the performance evaluation; however, it will be factored into the retirement benefits for those who retire after that date.

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20. Extended Leave: Performance evaluation and eligibility for salary increments and bonuses.

If you are on extended leave or plan to be, you can get information about your performance evaluation and eligibility for salary increments and bonuses by contacting HRSTM – Employee/Labor Relations.

Employee.LaborRelations@montgomerycollege.edu.

Supervisors please read [Extended Leave: Performance evaluation and eligibility for salary increments and bonuses](#).

ADMINISTRATORS AND SUPERVISORS

FINDING YOUR DIRECT REPORTS IN THE TMS

21. Where are my direct reports listed in the TMS?

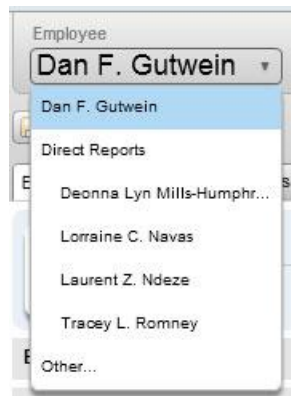
There are three key areas where Information about your direct reports can be found in in the TMS.

- a. **My Tasks** (the home page of the Performance Management Employee Center)

Task	Employee	Due
Approve Goal Plan	Deonna Mills-Humphress	Apr 1, 2015



- b. The **Talent Browser** (far right of the top menu bar.)
- c. The **Employee** dropdown button at the top of the Goal and Performance Evaluation pages.



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22. Why are some of my direct reports not listed in My Tasks?

Background: “My Tasks” is a chronological list of only those performance management duties you have not completed. Once completed, they disappear from the list. Typical duties include: TMS reminders to write create your own goal plan, to write your self-evaluation or acknowledge your evaluation, system requests to write the evaluations of your direct reports and requests by your direct reports to approve their goal plans.

Answer: If a new direct report was assigned to you within the last year and My Tasks does not contain the request to approve their goal plan or the reminder to write the evaluation, it may be happening for one of these reasons: (1) The employee may not have requested approval of the goal plan; (2) The previous supervisor may have completed the task. Check the goal plan to see if it has an **approved** status or the performance evaluation to see if it has a **closed** status. (3) The supervisor of record may not be updated in Banner. For specific help concerning your direct reports, goal plans and performance evaluations, please read the next FAQ and the FAQs pertaining to [Goals](#) and [Evaluations](#).

23. I can't find one or more of my direct reports listed anywhere in the TMS.

- a. To verify that an employee is not assigned to you, open the **Talent Browser** or the **Employee Dropdown** menu to see if they appear in the list. If they appear in the list then your problem is solved; otherwise, continue to the next paragraph. You can find step-by-step instructions in "*The Supervisor's Guide to Performance Evaluations in the TMS*" on the [HRSTM Performance Management Web Page](#).
- b. The previous supervisor may still be listed in Banner as the supervisor of record. Contact the TMS System Administrator (tms-evaluations@montgomerycollege.edu). They will work with HRSTM Records to verify, and if necessary, correct the supervisor information in Banner. Once corrected, assuming you are the supervisor, you will see your reports in the Talent Browser and the Employee dropdown menu. The System Administrator will also transfer the employees' **goal plans** to you and if any have the approval in progress you will see them in My Tasks.

If the previous supervisor managed the employees for at least six months, the System Administrator will also provide you with their contact information. You should contact them and ask if they would be willing to contribute **performance evaluation** ratings and comments for the employee. If they cannot participate in the evaluation, please contact the System Administrator and they will transfer the evaluations directly to you. If the previous supervisor does agree to write the ratings and comments, they should not submit the evaluation. They should transfer the evaluation to you when they are finished. If for any reason they are unable to transfer the evaluation back to you, the TMS System Administrator can transfer it back to you on their behalf.

Important: You, the supervisor of record, are ultimately responsible for writing the evaluations and complete the process: (1) make additions or modifications to the comments, (2) agree with or modify the ratings, (3) have the evaluation meeting with the employee, (4) submit/release the evaluation to the system, and (4) request acknowledgement of the evaluation.

24. My Task List shows tasks for employees who are no longer my direct reports.

- a. To verify that an employee is not assigned to you, open the **Talent Browser** or the **Employee Dropdown** menu to see if they appear in the list. If they do appear in the list, then you are the supervisor of record and you should go ahead and perform the task; otherwise, continue to the next paragraph.

- b. **If the task is to approve the goal plan of an employee**, contact the TMS System Administrator tms-evaluations@montgomerycollege.edu . They reassign the task to the new supervisor.
- c. **If the task is to write the evaluation of an employee**, contact the TMS System Administrator tms-evaluations@montgomerycollege.edu . They will verify the identity of the new supervisor.
 - a. If you were the supervisor for at least 6 months you should reach out to the new supervisor and offer to write evaluation comments and provide ratings. You should not submit the evaluation, but when you are finished, you should transfer it to the new supervisor.

You can find step-by-step instructions on how to transfer evaluation in the “*The Supervisor’s Guide to Performance Evaluations in the TMS*” on the [HRSTM Performance Management Web Page](#).

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GOAL PLANS

25. Am I responsible for the creation and approval of my direct report’s goal plans?

It is your responsibility to make sure that all your direct reports have approved goal plans. If by the deadline of March 30th there are no goals marked for inclusion in the performance evaluation, you will be unable to submit the evaluations to the TMS. If this causes you to miss the deadline for submitting evaluations, you will become ineligible for that year’s wage increment and bonus. This problem is completely preventable because the TMS allows supervisors to assign goals to their direct reports; thus, creating goal plans on their behalf. (For instructions on assigning goals see “*The Goal Module User Guide for the Talent Management System*” on the [HRSTM Performance Management Web Page](#).)

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26. What is my responsibility concerning the Multicultural/Diversity Goal?

First read [What is the Multicultural/Diversity Goal?](#) The TMS allows supervisors to create and assign goals to their direct reports. You should do this in the event the employee has not added this goal to their goal plan. Since attending a class or an event is something that cannot be evaluated with respect to “progress”, we strongly

recommend that employee explore ways in the course of performing their duties that develop and/or enhance their cultural competency.

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27. I don't see the task to approve my direct report's goal plan.

- a. Make sure you can find the employee listed in your Talent Browser or Employee Dropdown menu. If they don't appear there, then please jump to the FAQ [I can't find one or more of my direct reports listed anywhere in the TMS](#); otherwise, continue to the next paragraph.
- b. You will see the task to approve the goal plan only if the goal plan is not approved and the employee has requested you to approval it. Open the employee's goal plan and view the status.
 - a. If **Approved**, (even if approved by a previous supervisor) you still have the authority to work with the goal plan in any way you feel necessary. It will become **Not approved** if you add/delete a goal, change a goal's start/due dates or check/uncheck "include in the evaluation".
 - b. If/when **Not approved**, you have the authority to work with the goal plan in any way you feel necessary. If ample time has lapsed and the employee has not requested approval, you have the authority to act on behalf of an employee and use the TMS to request approval of the goal plan on behalf of the employee. After requesting approval, the task to approve the plan will appear in **My Tasks**. You will also see the "Approve" button within the goal plan and can use it to satisfy your obligation to approve the plan.
 - c. If **Approval in progress** you will not see the "Request to approve" in My Tasks, this means the employee requested approval from their previous supervisor and the supervisor did not approve the goal plan. (1) Ask the employee to open the goal plan and select **Terminate Approval** from the "More Actions" dropdown menu. (2) They should resubmit the plan for approval and then the task will appear for you in My Tasks.

For step-by-step instructions on performing the above tasks see "*The Goal Module User Guide for the Talent Management System*" on the [HRSTM Performance Management Web Page](#).)

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PERFORMANCE EVALUATIONS

28. The Supervisor Accountability Metric

The Supervisor Accountability Metric is an additional competency added to the existing 10 Staff Competencies. For supervisors, all eleven competencies are weighted equally and comprise one third of the total evaluation score. To read the Supervisor Accountability Metric visit the [HRSTM Performance Management Web Page](#)

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29. I'm unable to access one of my report's evaluations. It's not listed in My Tasks.

- d. Open your Talent Browser or the Employee Dropdown menu and verify that the employee is assigned to you. If they don't appear there, then please jump to the FAQ [I can't find one or more of my direct reports listed anywhere in the TMS](#); otherwise, continue to the next paragraph.
- e. The employee is assigned to you and you are the current supervisor of record; however, at the time the performance evaluations went live the employee was assigned to another supervisor. This locks you out of the evaluation.
- f. Contact the TMS System Administrator (tms-evaluations@montgomerycollege.edu).
- g. If the previous supervisor managed the employees for at least six months, the System Administrator will provide you with the supervisor's contact information. Reach out to that supervisor and ask if they would be willing to contribute performance evaluation ratings and comments. If they cannot participate in the evaluation, please contact the System Administrator and they will transfer the evaluations directly to you. If the previous supervisor does agree to write the ratings and comments, they should not submit the evaluation, but should transfer the evaluation to you when they are finished.
- h. If the previous supervisor cannot be reached or if for any reason they are unable to transfer the evaluation back to you, the TMS System Administrator can transfer it back to you on their behalf.

Important: You, the supervisor of record, are ultimately responsible for writing the evaluations and complete the process: (1) make additions or modifications to the comments, (2) agree with or modify the ratings, (3) have the evaluation meeting with the employee, (4) submit/release the evaluation to the system, and (4) request acknowledgement of the evaluation.

30. One of my direct reports has no goals in the evaluation. What can I do?

You may have missed the March 31th goal plan approval deadline or you may have approved a goal plan that had no goals marked for inclusion in the performance evaluation. Please e-mail Tms-Evaluations@montgomerycollege.edu. This has serious

consequences. Please read the above question "[Am I responsible for the creation and approval of my direct report's goal plans?](#)"

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31. Can I transfer one or more of my direct reports evaluations to another supervisor?

The specific circumstances addressed in the 4 questions following this one will dictate the actual requirements and procedures; however, all circumstances are subject to the following policies and constraints:

1. Performance evaluations may only be transferred to other supervisors.
2. Only the circumstances described below warrant the transfer of an evaluation to a previous or proxy supervisor.
3. The current supervisor of record is ultimately responsible for submitting the completed evaluation by the deadline, even if the previous or proxy supervisor is unable to collaborate.

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32. An employee recently joined my team. Can I transfer their evaluation to the previous supervisor?

Policy: The employee must have been a direct report of the previous supervisor for at least half of the evaluation period (5 months for 10-month employees and 6 months for 12 month employees.)

What to do: If you do not know the identity of the previous supervisor of record, contact tms-evaluations@montgomerycollege.edu and the TMS System Administrator will provide you with the supervisor's contact information. You should then contact the supervisor and ask if they would be willing to contribute evaluation ratings and comments. If they agree, you should transfer the evaluation to them. When the previous supervisor finishes contributing to the evaluation they should transfer it back to you. If they are unable to transfer the evaluation back to you, the TMS System Administrator can transfer it back to you on their behalf. Since you are the supervisor of record going forward, you are ultimately responsible for writing the evaluation, even if the previous supervisor cannot contribute. You are expected to complete the process: (1) make additions or modifications to the comments, (2) agree with or modify the ratings, (3) have the evaluation meeting with the employee, (4) submit/release the evaluation to the system, and (4) request acknowledgement of the evaluation.

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33. The supervisor left the College or is on long-term leave. Who will complete their evaluations?

Contact tms-evaluations@montgomerycollege.edu and inform the TMS System Administrator of the situation. She will determine if the direct reports have been assigned to another supervisor in Banner. If the evaluations of the direct reports have not already been transferred to the new supervisor, she will transfer them at that time. If a new supervisor has not been identified, the direct reports will temporarily be assigned to the absent supervisor's direct superior, the evaluations will be transferred to them, and they will be required to approve the goal plans for the next fiscal year and write the evaluations for the absent supervisor's direct reports.

34. Extended Leave: Do I evaluate a direct report who is, or plans to be, on extended leave?

Supervisors only become eligible for salary increments or bonuses if they have approved this year's goal plans and submitted this year's performance evaluations for 100% of their direct reports. If one of your direct reports is, or plans to be on extended leave, they may not be eligible for an increment. To determine the employee is exempt from being evaluated please contact HRSTM – Employee Relations Brenda.Williams@montgomerycollege.edu .

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MORE HELP & CONTACTS

HRSTM PERFORMANCE MANAGEMENT WEB PAGE

[The Performance Management Web Page](#) contains copies of performance evaluation memoranda, the performance management cycle and deadlines, the respective competencies and rubrics for staff, administrators and department chairs, the Goal and Performance Evaluation Module Guidebooks, tutorials and the six-month probationary evaluation form for staff.

TECHNICAL QUESTIONS ABOUT USING THE TALENT MANAGEMENT SYSTEM

Ms. Deonna Mills-Humphress
TMS-Evaluations@montgomerycollege.edu
Extension 7-4271

WRITING AND DEVELOPING GOAL PLANS

Ms. Carmen D'Agostino
Carmen.D'Agostino@montgomerycollege.edu
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WRITING PERFORMANCE EVALUATIONS

Dr. Dan Gutwein
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