

Checklist to Establish a Performance Incentives Plan

- _____ 1. Check with the Department of Budget and Finance to ensure that the source of funds can be used for the proposed purpose.
- _____ 2. Notify the affected employees' union(s) of the intent to develop a performance incentives plan, concurrently or prior to obtaining employee input on components of the plan.
- _____ 3. Obtain employee input in the development of the performance incentives plan, including establishment of target objectives and awards.
- _____ 4. Develop a formal Performance Incentives Plan proposal that includes the components identified in Part 5A, *Formal Performance Incentives Plan*.
- _____ 5. Submit proposal to HRD for review and approval.
- _____ 6. Confer with Accounting and General Services for payroll processing purposes, if appropriate.
- _____ 7. Consult or negotiate with the affected employees' union(s), as applicable, prior to implementation. If the employees are excluded from collective bargaining, the department head or designated representative must consult with the affected employees.
- _____ 8. Communicate target objectives, awards, and plan parameters with affected employees prior to the evaluation period.

Upon implementation of the plan,

- _____ 9. Objectively review the employee's performance against the established target objectives to identify employees who meet the objectives and qualify for the award.
- _____ 10. Maintain accurate records of all awards as outlined in Part 5C, *Documentation*, including the reasons for granting each award.
- _____ 11. Evaluate the effectiveness of the plan and authorize changes in or termination, as appropriate.
- _____ 12. Submit to HRD at the end of each evaluation period the required documentation as outlined in Part 5C, *Documentation*.