

2023 NSM Employee

Performance Development Guide

**NATIONAL
SEATING &
MOBILITY**



2023 NSM Employee Performance Development Guide

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Mission, Vision & Values

OUR MISSION.

We deliver personalized **solutions** to individuals with **mobility** challenges by bringing together industry-leading expertise, uniquely engineered systems and **breakthrough technologies**. Our products and services provide independence and **self-reliance** to clients; reassurance to family and caregivers; and responsive, flexible and highly professional **clinical support** to our referral sources.

OUR VISION.

Our calling goes beyond being a preferred provider of mobility solutions. It is how we **touch lives** with a genuine **compassion** that begins deep within our hearts and is carried throughout everything we do. It is what will continue to drive us to build **lifelong relationships** with our clients, **honoring their journey** of independence with ingenuity and excellence that **helps them move through life**.

We will never be satisfied until we have **exceeded the expectations** of those we serve in our quest to be a **trusted partner**. Breaking more barriers, impacting more lives. Taking us where we aspire to be, and our clients, **where they deserve to go**.

CORE VALUES.

Honor

Doing the right thing, even when no one is looking.

Excellence

Always striving to do better.

Accountability

Being motivated and responsible for our actions and results.

Respect

Treating others as you want to be treated.

Teamwork

Working together to achieve more.

Service

Taking action to create value for others.

Performance Development at NSM

Creating a culture of Performance Development is a key priority at NSM to attract, develop and retain top talent.

The Performance Development process is a key component of the Employee Lifecycle.



The Performance Development Discussion informs the employee of where they stand regarding their performance and contribution to NSM's success. It's an opportunity to receive positive feedback as well as developmental coaching on areas for improvement. This designated time for the performance discussion provides the employee an opportunity to give feedback to their manager/supervisor, clarify expectations, and discuss career aspirations.

The Performance Development Discussion should be a summary of the feedback and coaching that has taken place throughout the year.

2023 Performance Development Process Includes:

- Utilization of the UKG® system to facilitate the Performance Development Discussion
- An Employee Self-Reflection
- Assessment of HEARTS Core Values
- Assessment of overall performance in the role
- An opportunity to list strong performance areas and areas to seek improvement
- An opportunity to discuss career aspirations and desired developmental opportunities
- An opportunity to provide feedback to manager/supervisor on areas where you can be better supported

UKG

UKG UKG is NSM's integrated talent management tool. This system allows employees to document performance goals, discuss competencies, track development activity and manage/update career information.

UKG makes performance development a continuous, collaborative experience.

Utilize the step-by-step job aid on page 10 to use UKG in the Performance Development process.

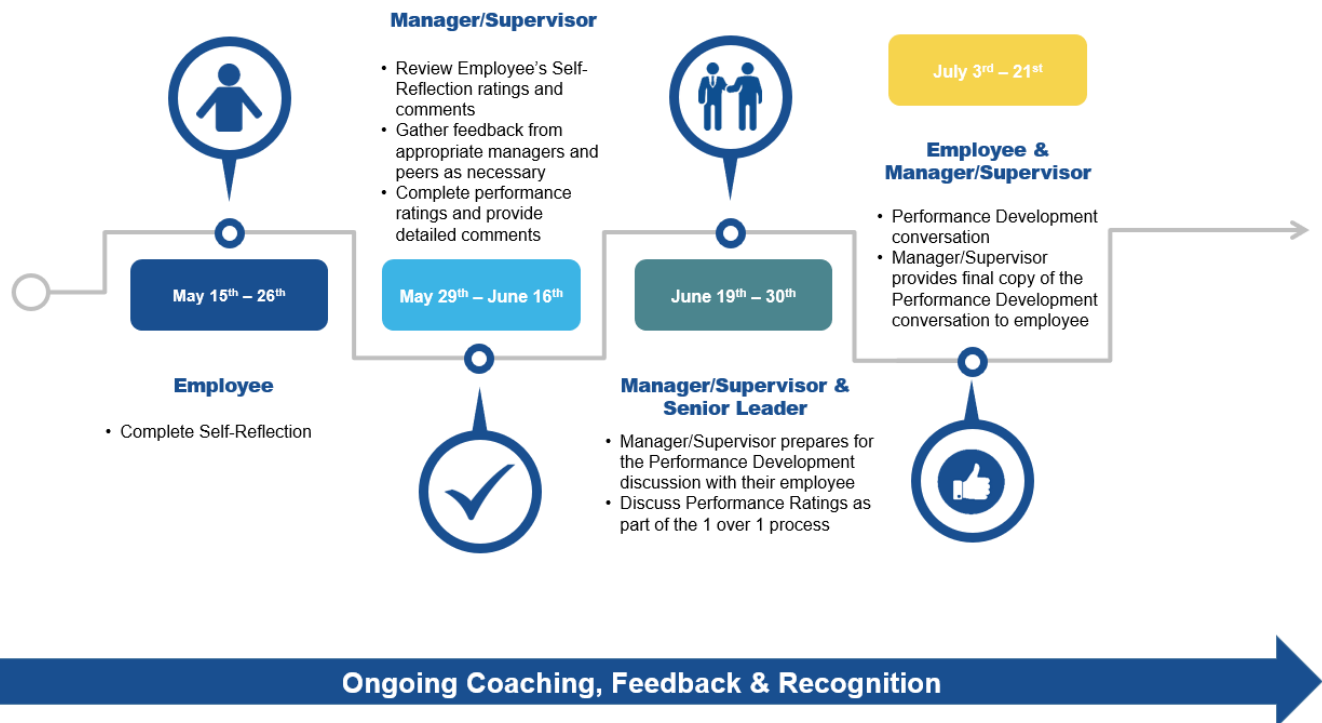
2023 Performance Development Timeline

New Employees

Employees hired before January 1, 2023, (excluding Funding or Billing/Collections teams) will be included in the 2023 Performance Development process.

Multiple Managers/Supervisors

If you have had multiple positions and/or managers/supervisors during the performance development period, your former manager/supervisor will be asked to provide feedback and input for your development discussion.



NSM Core Competencies

At NSM our competencies are reflective of our Core Values, HEARTS. Core Values support the vision, shape the culture and reflect the desired behaviors. In 2023, employees will receive one rating for how they exhibit values. Employees and Leaders should include specific comments around the values and behaviors they excel in, as well as those that need development.

Value	Behaviors
Honor <i>Doing the right thing, even when no one is looking</i>	- Fully understands and is compliant with NSM's policies and procedures. - Demonstrates strong character. Builds trust and acts with authenticity to create a culture of integrity by being truthful and transparent. - Adheres to high standards of personal and business ethics and behaviors.
Excellence <i>Always striving to do better</i>	- Can be counted on to provide timely, high quality work. Often generates ideas for improvement. - Welcomes new challenges and commits to contributing additional effort to achieve results. Has a "can do" attitude. - Consistently demonstrates a positive and professional image of NSM. - Takes initiative to seek professional development opportunities to acquire new skills and experiences that ensures industry-leading expertise.
Accountability <i>Being motivated and responsible for our actions and results</i>	- Takes ownership of personal actions and decisions. - Eagerly accepts responsibility for the role and is highly productive and reliable. Has the ability to successfully prioritize competing demands. - Proactively asks questions to ensure a strong understanding of the job expectations. - Seeks to solve problems and works to prevent their reoccurrence. Never walks past problems.
Respect <i>Treating others as you want to be treated</i>	- Appreciates and acknowledges other's contributions. Is encouraging and builds self-esteem in others. - Values differences and diversity within the workplace. - Always treats others with kindness and dignity. Helps people be their best. - Fosters professional and positive communication with others.
Teamwork <i>Working together to achieve more</i>	- Promotes a productive and cooperative work environment. - Builds trustworthy, collaborative relationships with team members. Listens objectively and respects other's ideas and opinions. - Has the ability to compromise and successfully negotiate good outcomes when there is conflict among the team. - Holds self and others accountable to accomplish individual and team goals.
Service <i>Taking action to create value for others</i>	- Is attentive to customers, gaining their trust and respect. - Committed to delivering exceptional care to customers (both internal and external). - Identifies opportunities to exceed customer expectations. - Demonstrates compassion and empathy for internal and external customers.

Performance Development Measures

Development measures will be used for the HEARTS Core Values, overall performance rating, and the final score.

Performance Development Measurement	
High Performer	Performance in role clearly exceeds expectations. One of the best I know.
Solid Performer	Performance in role meets the high expectations of NSM. Keep up the good work!
Needs Improvement	Performance in role is below expectations. Development needed.

The discussion includes a final overall feedback measure. Leaders will select your final measurement score as appropriate.

Self-Reflection

The employee Self-Reflection process is divided into three parts.

Part 1: Competencies

Part 1 of the Self-Reflection includes HEARTS Core Values and an Overall Performance measurement rating.

HEARTS Core Values Measurement:

Measure how well you modeled NSM's HEARTS Core Values and how well you performed overall. Add specific comments, as appropriate.

Overall Performance Ratings:

Measure how well you have performed during the past year. Add specific comments, as appropriate.

Part 2: Open Ended Questions

Part 2 includes four open ended questions:

Employee demonstrates strong performance in these areas:

- Think about what you do well on a consistent basis. Consider areas in which you display natural strength. How can you use these strengths to help your teammates grow?

Areas to seek improvement:

- Reflect on what you can improve upon. Consider the areas of your role in which you may struggle or need further support or training.

Areas to gain additional experience, training or education:

- Discuss with your manager your career aspirations and desired areas of growth. Review potential career paths.

As a manager, where can I offer you additional support?

- Provide feedback to your manager or supervisor on how they can better support you.

- ✓ **Utilize the step-by-step job aid on page 10 for instructions on completing Self-Assessments in UKG®.**

Part 3: Overall Comments

The Overall Comments section is used to include any final thoughts regarding your performance.

Tips for adding Overall Comments:

- Consider adding ideas for better communication between you and your manager/supervisor.
- Do you have access to all the tools and/or resources you need to do your job? If you don't, what are the roadblocks that are keeping you from getting those tools and/or resources?
- Do you have any concerns you would like to bring up about your department or the company?

Prepare and Participate in your Development Discussion

Why is the Performance Development process important?

- Provides an opportunity for recognition of key accomplishments.
- Establishes a clear understanding of job duties, responsibilities, and priorities.
- Performance strengths and developmental opportunities are explored.
- Opportunity to receive coaching and feedback for becoming more proficient and productive.
- Opportunity to discuss career aspirations.
- Opportunity for employees and their manager/supervisors to align on future goals.

How to Prepare for your Development Discussion

- Complete the self-reflection honestly and accurately.
- What were your accomplishments? What goals did you meet? What areas are you most proud of?
- What goals did you not meet? Reflect on reasons for not meeting these goals.
- What areas of your position can you show improvement?
- What opportunities/concerns do you see in regard to your performance?
- Be as detailed as possible when giving examples of performance.
- Focus on your own behavior and not the behavior of others.
- It is a good idea to keep notes throughout the year to track your accomplishments and goals.

During the Development Discussion

- Remember that the Performance Discussion is about open and productive communication between you and your manager/supervisor.
- Suggest ways that your manager/supervisor might remove barriers in your role.
- Discuss career development.
- Treat the performance discussion as an opportunity to reflect on the last year. What areas of performance were you most proud, and what areas of performance could have been better?

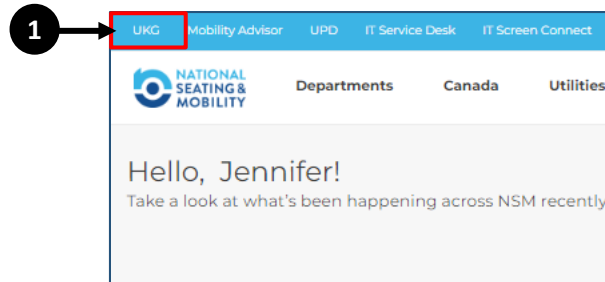
After the Performance Discussion

- Your manager/supervisor should discuss positive performance and areas for improvement throughout the year. However, it is in your best interest to open up discussion about performance during the year, even if your manager/supervisor does not initiate it. Communication is a shared responsibility.
- Regard the Performance Development process as a learning opportunity. You should be able to take away valuable information about yourself, your manager/supervisor expectations, and goals and opportunities for the coming year.
- After reflecting on the meeting, contact your manager/supervisor to clarify any comments that may have been vague or need further explanation.

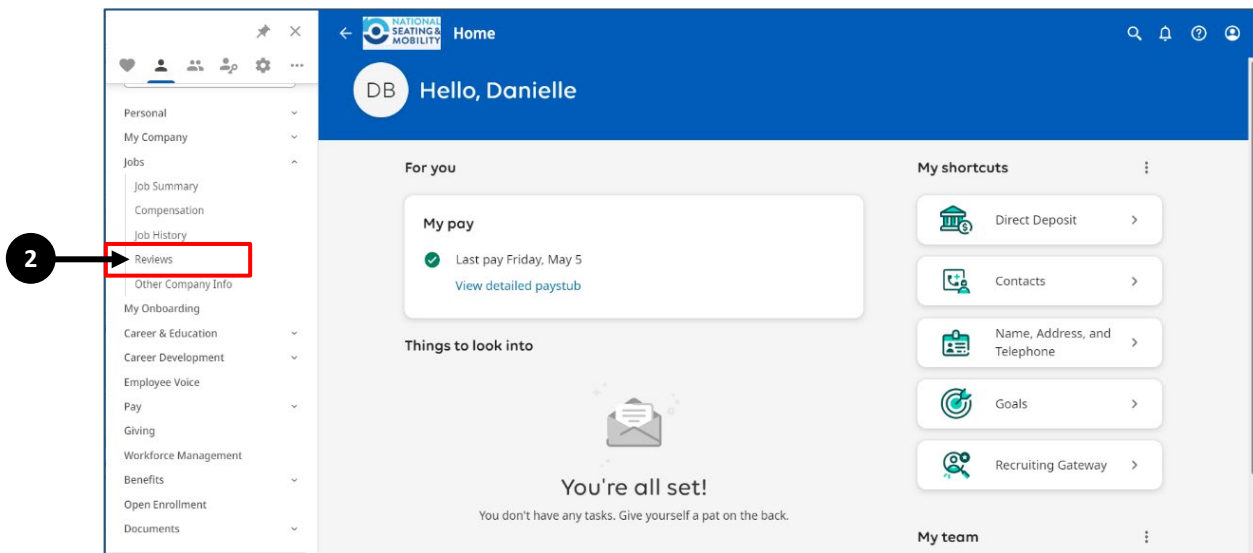
UKG: Complete Annual Self-Reflection

This job aid is intended for NSM employees to utilize when completing their annual self-reflection in UKG.

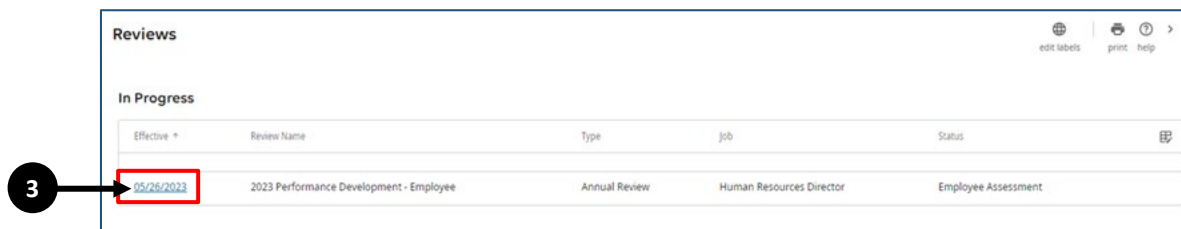
1. Click the link to **UKG** via WNSM.



2. Select **Reviews** from the Jobs sub-category under the **Myself** section.



3. Click the effective date hyperlink to select the 2023 Performance Development.



UKG: Complete Annual Self-Reflection

***Note:** The Employee Self-Reflection process is broken into three parts: Competencies, Open Ended Questions and Overall Comments.

4. To complete the Competencies Review Section, click **Start**.

2023 Performance Development - Employee
Ashley Herb, Human Resources Director [Employee Notes](#)
Effective Date 05/26/2023

Contributors

Ashley Herb
Due Date 05/19/2023

Ann E Mahaffey
Due Date 05/26/2023

Review sections

	Employee Rating	Manager Rating	
Competencies	—	—	4 → Start
Open Ended Questions	N/A	N/A	Start
Overall Comments	N/A	N/A	Start
Final Score	—	—	

5. Within the Competencies section, you're prompted to rate how you have modeled NSM's Core Values as well as your Overall Performance within the past year. Select the corresponding drop down that represents your self-rating (both ratings are required). For guidance on how to rate yourself, see the rating scale below.

6. Enter comments related to your rating.

***Note:** The final score will populate based on the average score of your HEARTS rating and Overall Performance score. Your manager will be able to override the final score given to you.

2023 Performance Development - Employee

Ashley Herb - Competencies

Rating Scale [Three Point Performance Development Measures](#)

1. ▾ HEARTS Core Values Competency Weight: 50%

Models NSM's core values, supports the mission/vision, and behaves in a way that reflects our HEARTS culture. Honor, Excellence, Accountability, Respect, Teamwork, Service. Specify areas the employee excelled and areas in which the employee needs improvement.

[Show details...](#)

[Notes](#)

Ashley Herb, Employee

5 → **2 - Solid Performer**

6 → **Add your comments**

Performance Development Rating Scale	
High Performer	Performance in role clearly exceeds expectations. One of the best I know.
Solid Performer	Performance in role met the high expectations of NSM. Keep up the good work!
Needs Improvement	Performance in role is below expectations. Development Needed

UKG: Complete Annual Self-Reflection

7. Click **save** to save progress or click **save & close** at the top of the Competencies Review Section page to move to the next Review Section.



8. To complete the Open Ended Questions, click Start.

2023 Performance Development - Employee
Ashley Herb, Human Resources Director [Employee Notes](#)
Effective Date 05/26/2023

Contributors

Ashley Herb Due Date 05/19/2023 → Ann E Mahaffey Due Date 05/26/2023

Review sections

	Employee Rating	Manager Rating	
✓ Competencies Completed	2 - Solid Performer	—	Edit
Open Ended Questions	N/A	N/A	8 → Start
Overall Comments	N/A	N/A	Start
Final Score	2 - Solid Performer	—	

9. Utilize the Open Ended Questions section to provide feed back in four areas:

- Areas where you have had strong performance
- Areas to seek improvement
- Additional experience or training you would like, and
- Where your manager can offer additional support

10. Add your comments in the box under each section.

Performance Development - Employee
Test TestEE - Open Ended Questions

1. ▾ Employee demonstrates strong performance in these areas:
Test TestEE, Employee

10 → Add your comments

Buttons: save, reset, cancel, save & close, print, help

UKG: Complete Annual Self-Reflection

11. Click **save** to save progress or click **save & close** page to move to the next Review Section.



12. To complete the Overall Comments Review Section, click **Start**.

A screenshot of the '2023 Performance Development - Employee' page for Ashley Herb. The page shows the employee's name, title (Human Resources Director), and effective date (05/26/2023). Below this, there are sections for 'Contributors' (Ashley Herb and Ann E Mahaffey) and 'Review sections'. The 'Review sections' table has columns for 'Competencies', 'Open Ended Questions', 'Overall Comments', and 'Final Score'. The 'Overall Comments' row is highlighted, and a red box with a black circle containing the number '12' and an arrow points to the 'Start' button in the 'Overall Comments' row.

13. Enter final thoughts regarding your performance.

14. Click save to save progress or click save & close to close the Overall Comments Section.

A screenshot of the 'Ashley Herb - Overall Comments' page. The page has a title bar with '2023 Performance Development - Employee' and 'Ashley Herb - Overall Comments'. Below the title, there is a text area for 'Add your comments' which is highlighted with a red box and a black circle containing the number '13' and an arrow. To the right of the text area, there is a navigation bar with icons for 'edit labels', 'save', 'cancel', 'save & close', 'print', and 'help'. The 'save' and 'save & close' buttons are highlighted with red boxes and black circles containing the number '14' and arrows.

UKG: Complete Annual Self-Reflection

15. When the Self-Reflection is complete, you may enter **Routing Comments** for your manager/supervisor and other NSM manager's that may contribute to your Performance Development Conversation, as necessary. These comments are visible to all review contributors, however they do not appear on the final document.

16. Click **Send**.

***Note:** Additional edits to the Self-Reflection cannot be made once the Send button has been clicked.

The screenshot shows a 'Send' button in the top right corner, highlighted with a red box and a callout number 16. Below the button is a text input field for 'Routing Comments', highlighted with a red box and a callout number 15. The text input field is empty and has a light gray background. Below the input field is a light gray bar.

17. A final score will populate in the "Final Score" row. This is the average of your scoring for Overall Performance and HEARTS rating.

The screenshot shows the 'Review Summary' section. It includes the employee's name, title, and effective date. Below this is a table with three columns: 'Review sections', 'Employee Rating', and 'Manager Rating'. The table has four rows: 'Competencies Completed', 'Open Ended Questions Completed', 'Overall Comments', and 'Final Score'. The 'Final Score' row is highlighted with a red box and a callout number 17.

Review Summary		
2023 Performance Development - Employee		
Ashley Herb, Human Resources Director Employee Notes		
Effective Date 05/26/2023		
Contributors		
Ashley Herb Due Date 05/19/2023	→	Ann E Mahaffey Due Date 05/26/2023
Review sections		
Competencies Completed	2 - Solid Performer	—
Open Ended Questions Completed	N/A	N/A
Overall Comments	N/A	N/A
Final Score	2 - Solid Performer	—

UKG: Complete Annual Self-Reflection

18. After your Performance Development Discussion, your manager/supervisor will send the final review back to you for acknowledgement and signature.

***Note:** Employee and manager/supervisor ratings and comments are included in the final review.

19. Access the final Performance Review via the Main Menu. *(Refer to steps 2-4 of this job aid)*

20. Enter Final Comments related to your Performance Development as necessary.

21. Click **Send**.

Send

Send to the next contributor:

☒ Send **forward** to Test TestEE to Sign & Complete

☐ Send **back** to Regina Evans for changes

21 → **Send**

Routing Comments

These comments will not appear on the final review and are visible to all review contributors.