

# Position Assessment Model – Experience Rating

Use this Excel **Position Assessment Model** for new position candidates or existing employees and have the individual perform a "self-assessment" and use as a benchmark to compare to 90 day probation periods and or annual performance reviews to conduct a "gap analysis".

The gap analysis will assist with addressing any areas of concern and with developing new performance goals.

Keep in perspective that individuals typically will rate themselves higher, so establishing a benchmark will provide important metrics to actual performance.

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7		<b>Instructions:</b> On a scale of .5 - low (Expert) to 4-high risk (No Experience), (0 = N/A), rate each of your applicable Experience levels. [Notes: Experience and Qualifications Ratings will be computed automatically in this worksheet, using the ratings you enter. Move your pointer over each Professional Level cell marked with a red triangle, to see a definition of essential duties and responsibilities.] <b>Professional Level = Meets Position Requirements</b>																																																																																																																																																																																																																																																																		
10	<b>Spell Check</b>	<table border="1"> <thead> <tr> <th colspan="2">Expert Level</th> <th colspan="3">Professional Level</th> <th colspan="3">Junior Level</th> <th></th> </tr> <tr> <th>0</th> <th>.5</th> <th>1.0</th> <th>1.5</th> <th>1.6</th> <th>2.0</th> <th>2.9</th> <th>3.0</th> <th>3.5</th> <th>4.0</th> <th></th> </tr> </thead> <tbody> <tr> <td>Monitor &amp; Benchmark Standard Process Key Metrics</td> <td colspan="3"></td> <td colspan="3">Follows Standard Processes, Deliverables &amp; Milestones</td> <td colspan="3">Perform in accordance with standard procedures.</td> <td>2</td> </tr> <tr> <td>Manages Cross-Functional PM Teams</td> <td colspan="3"></td> <td colspan="3">Coordinates Cross-functional Teams</td> <td colspan="3">Contributing Cross-functional Team Member</td> <td>2</td> </tr> <tr> <td>Establishes or Leads Project Plan Development</td> <td colspan="3"></td> <td colspan="3">Creates &amp; Maintains Project Plans</td> <td colspan="3">Implement &amp; Track Project Plan</td> <td>1</td> </tr> <tr> <td>Portfolio Financial Reporting</td> <td colspan="3"></td> <td colspan="3">Complies &amp; 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# Position Assessment Model – Qualifications Rating

Built-in control buttons. Use the Clear Entries to reset the template or use the PDF button.

**Position Assessment Model**  Self-Assessment: \_\_\_\_\_  HR Assessment: 6/5/2012  Supervisor Assessment: \_\_\_\_\_

Position: Sr. IT Project Manager Example Job Code: SrPM-2121 Location: US-Regional

**Position Description:** Senior Project Manager participates in the delivery of project management services to the IT department. These services include:

- Project/program management support for IT projects.
- Participate in the development and maintenance of standardized processes for project management and software development.
- Participate in project portfolio maintenance and reporting.

New Position  Existing Position

Candidate  Employee

Name: Mr. John Smith **1.7** Experience Rating **1.5** Qualifications Rating **4** PM Skill Level

## Qualifications Rating

**Instructions:** Follow the same instructions as provided in the Experience section above.

Change Position Requirements as needed for any position.

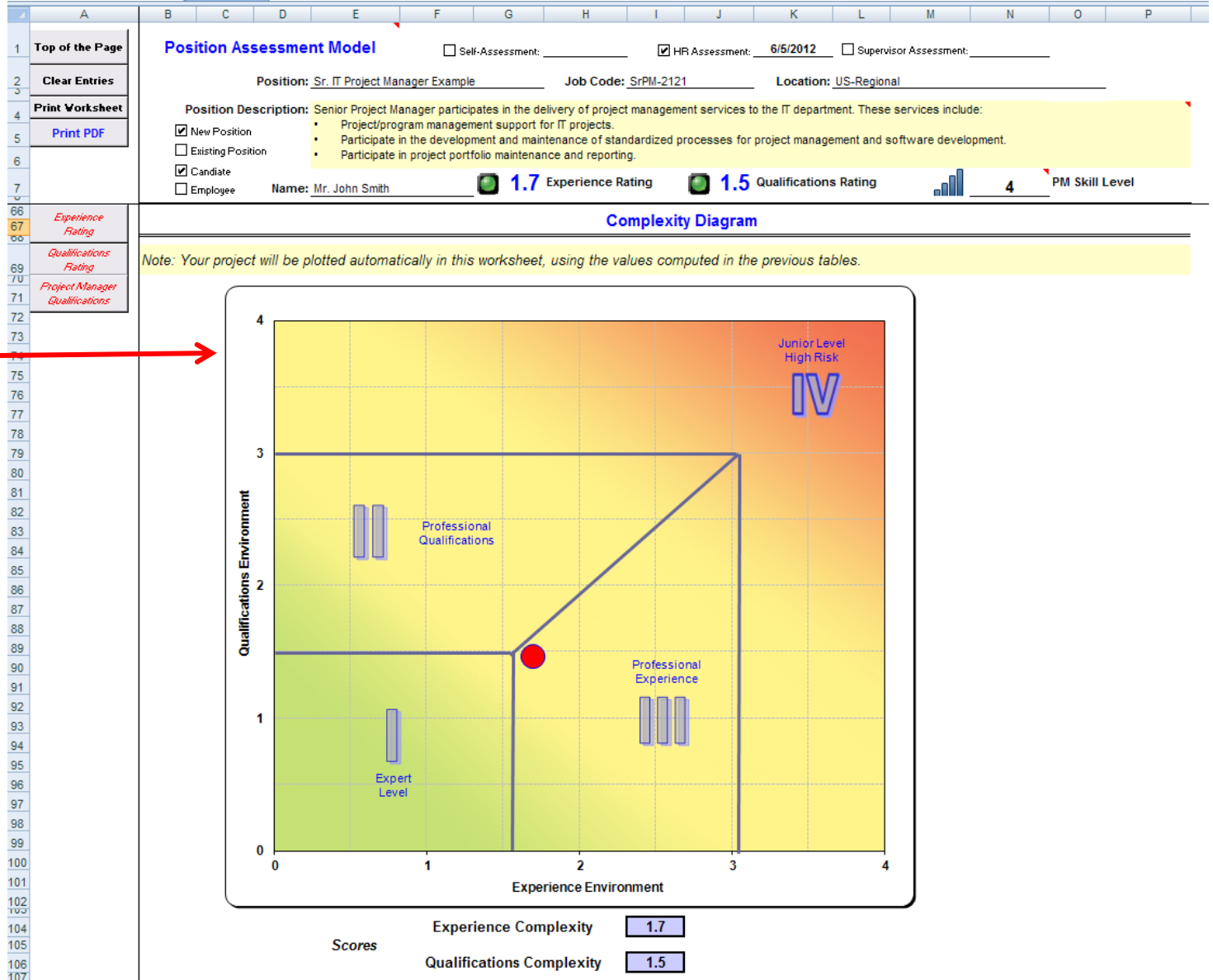
Exceeds		Meets		Does Not Meet						
0	.5	1.0	1.5	1.6	2.0	2.5	3.0	3.5	4.0	
Bachelor Degree or Other Education			Bachelor Degree or Equivalent Experience			Graduate Degree, 1 Year Experience			0.5	
PMP Certification or within 3 Months			Strong Knowledge of Project Management Institute (PMI) Models and Knowledge Areas			Does Not Meet PMI Requirements			0.5	
SDM - Waterfall, Prototyping, Spiral or Agile			Strong Knowledge of at Least One Software Development Methodology			1+ Related Work Experience			1	
10+ Years Related Work Experience			5+ Related Work Experience			1+ Related Work Experience			1	
10+ Years Systems/Project Management Experience			2+ Years Systems/Project Management Experience			1+ Related Work Experience			1	
Executive Level Communication Skills			Strong Verbal & Written Communications Skills			1 Year Communication Skills			2	
Expert Computer Skills			Exceptional Computer Skills (MS Office) & Visio +			Average Computer Skills (MS Office)			0.5	
Advance MS Project/Server or other Scheduling Skills			Ability to Create Complex Schedules with MS Project			Limited Experience			1.5	
C-Level Respect & Buy-in			Tactful Consensus & Negotiating Skills			Limited Experience			2	
Executive Management Experience			Strong Client & C-Level Executive Presence			None			2	
Chairing Executive & Governance Committees			Experience Managing Cross-Organizational Teams.			None			2.5	
Consultant Level PMLC & SDLC Knowledge			Familiar with PMLC & SDLC Methodologies			Limited Experience			0.5	
Achieved Multiple Achievement Awards			Proven Successful Projects (Plan, Time & Budget)			1 Completed Project			1.5	
Never Requires Supervision			Work Independently with Minimal Supervision			Requires Supervision			1.5	
Portfolio Manager			Manage Multiple Projects Concurrently			Single Project			2	
			Proven Leadership & Personnel Management Experience			Limited Experience			2	
Advance Presentation Skills			Strong Presentation Skills			Limited Experience			2.5	
Seasoned Professional/ Government Security Clearance			Displays Professionalism, Honesty, Integrity, Self Confidence, Maturity, Respect and Conviction			meets Requirements			2	
									Total:	26.5
									Rating:	1.5

*Experience Rating*

*Complexity Diagram*

*Project Manager Qualifications*

# Position Assessment Model – Complexity Diagram



## The Complexity Diagram or Chart

provides an overall metric to where the individual rates to the position requirements, showing strengths and weakness areas.

In this example, the new candidate's qualifications is slightly higher than the experience rating.

This chart will assist with assessing which areas need improving or requires new challenges or responsibilities.

# Position Assessment Model – PM Skills Rating

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
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2	<b>Clear Entries</b>	Position: <u>Sr. IT Project Manager Example</u> Job Code: <u>SrPM-2121</u> Location: <u>US-Regional</u>														
3		<b>Position Description:</b> Senior Project Manager participates in the delivery of project management services to the IT department. These services include:														
4	<b>Print Worksheet</b>	<ul style="list-style-type: none"> <li>• Project/program management support for IT projects.</li> <li>• Participate in the development and maintenance of standardized processes for project management and software development.</li> <li>• Participate in project portfolio maintenance and reporting.</li> </ul>														
5	<b>Print PDF</b>	<input checked="" type="checkbox"/> New Position <input type="checkbox"/> Existing Position <input checked="" type="checkbox"/> Candidate <input type="checkbox"/> Employee    Name: <u>Mr. John Smith</u> <b>1.7</b> Experience Rating <b>1.5</b> Qualifications Rating <b>4</b> PM Skill Level														
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114	<i>Complexity Diagram</i>															
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118																
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The **PM Skill Set Guidelines** provides an overall current metric of the individual's project experience by measuring; Complexity, Duration, Budget and Resources.

Complexity		Duration		Budget		Resources	
<input type="radio"/>	Zone 1	<input type="radio"/>	< 6 months	<input type="radio"/>	<\$500K	<input type="radio"/>	< 5
<input type="radio"/>	Zone II, Medium Zone III, Medium	<input type="radio"/>	< 1 year	<input type="radio"/>	<\$1M	<input type="radio"/>	<10
<input type="radio"/>	Zone II, High Zone III, High	<input checked="" type="radio"/>	>1 year; < 3 years	<input type="radio"/>	>\$1M; <\$5M	<input checked="" type="radio"/>	11 – 20
<input checked="" type="radio"/>	Zone IV	<input type="radio"/>	>3 years; <10 years	<input checked="" type="radio"/>	>\$5M; <\$100M	<input type="radio"/>	21 – 40
		<input type="radio"/>	>10 years	<input type="radio"/>	>\$100M	<input type="radio"/>	40+
<b>PM Level:</b>		<b>4</b>	Experience: 15+ years working as Sr. Project Manager on medium or other large IT projects under the supervision of Project Director/VP. Technical experience commensurate with the proposed technology. Professional Knowledge: Expert working knowledge of PMI standard project management methodology (PMBOK), PLCF and SDLC. Expert with Budgeting, Procurement and Contracting processes, Personnel and Contractor Management.				
<b>For Oversight Purposes</b>		Zone I = Low Criticality/Risk		Zones II and III = Medium Criticality/Risk		Zone IV = High Criticality/Risk	