

**MANAGEMENT PLAN (MP)**

**EMPLOYEE PERFORMANCE REVIEW**

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| --- | --- | --- | --- | --- | --- | --- |
| **Employee Name:** |  | | | | **Position Title:** |  |
| **Department:** |  | | | | **Supervisor:** |  |
| **Performance Review Period:** | | **From:** | |  | **To:** |  |
| **Annual** | | | **6 Months** | | **Other:** |  |

**AREAS TO BE EVALUATED**

***Strategic Leadership* - Ability to inspire, influence and enable others to achieve a specific mission. Identifies and communicates the strategic mission of the organization and the functional area for which s/he manages.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Exceptional ability to plan and control work activities. Respected by others and generates a high degree of cooperation. Exhibits a positive image and acts as a role model to others while improving morale. | Very effective in establishing priorities. Capable and consistent leader. Motivates others and consistently seeks ways to improve morale and present a positive image. | Motivates others and meets routine schedules. Is a good role model and helps maintain a positive morale. | Has some difficulty in planning ahead, motivating and developing others. Usually behind schedule; poor role model. | Unable to plan, delegate, and organize effectively. Does not exhibit positive morale or motivation. |
| **Comments/Examples:** | | | | |

***Decision Making***– **Acts on and makes timely decisions with business direction. Comprehensively analyzes problems and develops effective and efficient solutions**.

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Consistently generates constructive ideas for change as appropriate and seeks ways to improve individual and department performance that go beyond expectations Consistently anticipates departmental needs and takes action to meet them. | Often suggests constructive ideas for change. May seek ways to improve individual and department performance that go beyond expectations. Often anticipates department needs and takes actions to meet them. | Regularly suggests constructive ideas for change. Periodically may seek ways to improve individual and department performance that go beyond expectations for this position. Regularly anticipates departmental needs and takes action to meet them. | Often does not seek ways to improve individual and departmental performance. Seldom suggests constructive ideas for change. Requires explicit instructions to undertake a new task. | Consistently ignores obvious problems that will negatively affect the work environment. Only accepts responsibility for regular duties. Unwilling to start or continue any task without detailed instructions from supervisor. |
| **Comments/Examples:** | | | | |

***Customer Focus*** - **Ability to anticipate and meet internal/external customer needs in a timely manner. Ensures customer satisfaction through process of monitoring, developing, improving and delivering excellence in products and services.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Consistently demonstrates exceptional level of service to internal and external customers, going substantially beyond what is required. | Often demonstrates very high level of service to internal and external customers, often going beyond what is required. | Regularly demonstrates satisfactory level of service to internal and external customers, doing what is required. | Often demonstrates unsatisfactory level of service to internal and external customers, failing to do what is required. Receives negative feedback from customers. | Consistently demonstrates poor level of service to internal and external customers, failing to do what is required. Consistently receives negative feedback from customers. |
| **Comments/Examples:** | | | | |

***Productivity*** – **Conveys an attitude of dependability and cooperation. Ability to go beyond job description when appropriate to help in extraordinary situations. Ability to work effectively with other individuals and/or departments to enhance the productivity of the entire organization.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Consistently produces an exceptional amount of work. | Often produces an amount of work that is substantially above the standards. | Regularly produces an amount of work that meets the standards and may periodically exceed them. | Often fails to produce an amount of work that meets the standards. | Consistently fails to produce an amount of work that meets the standards. |
| **Comments/Examples:** | | | | |

***Teamwork/Staff Development* – Builds winning teams by encouraging and initiating regular discussion of performance with subordinates as well as fosters professional development. Works cooperatively with others, keeps other informed of necessary and factual information. Promotes harmony amongst employees and across departments.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Consistently demonstrates team building/partnership skills and cooperation substantially beyond what is required. Regularly and consistently discusses performance with subordinates and strongly encourages them by providing professional development opportunities. | Often demonstrates very high level of cooperation and establishes partnerships with others, often going beyond what is required. Consistently discusses performance with subordinates. May provide or suggest potential professional development opportunities and routinely encourages subordinates to participate. | Regularly demonstrates satisfactory level of cooperation and regularly partners with others to do what is required. Routinely discusses performance with subordinates and may suggest or provide occasional professional development opportunities. | Often demonstrates unsatisfactory cooperation and often fails to develop necessary partnerships. Rarely discusses performance with subordinates and provides limited opportunities for professional development. | Consistently demonstrates poor partnership and teamwork skills. Routinely fails to discuss performance with subordinates and does not provide or encourage professional development. |
| **Comments/Examples:** | | | | |

***Resource Management and Initiative* – Identifies new ways to improve quality, productivity and customer service, Maximizes talents and abilities. Uses available resources efficiently (e.g. time, materials, personnel). Maintains appropriate budgetary controls.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Consistently generates constructive ideas for change that will improve work effectiveness and/or address work problems. Consistently seeks ways to improve individual and department performance that go beyond the expectations. Consistently anticipates deparmental needs and takes action to meet them. | Often suggests constructive ideas for change that will improve work effectiveness and/or address work problems. May seek ways to individual and department performance that go beyond expectations. Often anticipates department needs and takes action to meet them. | Regularly suggests constructive ideas that will improve work effectiveness and/or address work problems. Periodically may seek ways to improve individual or department performance that go beyond expectations. Regularly anticipates departmental needs and takes actions to meet them. | Often does not seek ways to improve individual and departmental performance. Seldom suggests constructive ideas for change that will improve work effectiveness or address work problems. Requires explicit insruction to undertake a new task. | Consistently ignores obvious problems that will negatively affect the work environemnt. Only accepts responsibility for reualr duties. Unwilling to start or continue any new task without detailed instructions. |
| **Comments/Examples:** | | | | |

***Accountability* – Makes aggressive commitments and is willing to be judged against them. Trustworthy with unyielding integrity.**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| Admits mistakes, takes actions to correct and helps others learn from the mistake. Takes collective responsibility for total organization’s successes and failures within the scope of influence. Challenges self and others to increase results, delivering on or before committed deadline. | Recognizes and admits mistakes and takes action to correct. Acknowledges problems and provides solutions. Articulates, defines and sets clear expectations for self and others as appropriate. Reacts appropriately for the magnitude of the issue. Monitors process, progress and results for self and/or others. Gives honest and timely feedback. | Takes personal responsibility for the quality and timeliness of work, and achieves results with little oversight. Acknowledges problems and attempts to provide solutions.  Sets routine expectations for self and others as appropriate with limited guidance.  Monitors process, progress and results for self and/or others. Gives honest and regular feedback. | Still developing knowledge or skills for the job. Work needs periodic review to ensure accuracy. Requires guidance when setting goals. Understands the impact of decisions on own area. Recognizes and asks for assistance to solve problems. Works effectively but proficiency is still evolving. | Does not deliver results consistently and/or meet deadlines. Admits mistakes only when approached. Often blames others for shortcomings in own area of responsibility. Regularly does not keep others informed on progress of work. Over-reacts to situations. Allows issues to go unaddressed. |
| **Comments/Examples:** | | | | |

***Achievement of Goals* - This section individually assesses the status or completion of each goal for the current review period.**

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| --- | --- |
| Goal #1 | Achieved  In Progress  Other (Comments) |
| **Comments:** | |
| Goal #2 | Achieved  In Progress  Other (Comments) |
| **Comments:** | |
| Goal #3 | Achieved  In Progress  Other (Comments) |
| **Comments:** | |
| Goal #4 | Achieved  In Progress  Other (Comments) |
| **Comments:** | |
| Goal #5 | Achieved  In Progress  Other (Comments) |
| **Comments:** | |

***Goals and Action Plan* - This section should be used to establish individual goals and action plans for the next review period.**

|  |  |
| --- | --- |
| Goal #1 | Immediately  Ongoing  Due Date: |
| Action Plan: |  |
| Goal #2 | Immediately  Ongoing  Due Date: |
| Action Plan: |  |
| Goal #3 | Immediately  Ongoing  Due Date: |
| Action Plan: |  |
| Goal #4 | Immediately  Ongoing  Due Date: |
| Action Plan: |  |
| Goal #5 | Immediately  Ongoing  Due Date: |
| Action Plan: |  |

***Summary Overall Performance* -**

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| --- | --- | --- | --- | --- |
| Exceptional | Exceeds Expectations | Meets Expectations | Needs Improvement | Unsatisfactory |
| This rating is reserved for the highest level of performance that consistently exceeds standards and expectations during the evaluation period. An employee receiving this rating should have a consistent record of achievement. | This rating applies to an employee who consistently meets standards and expectations, often exceeds them, and shows initiative in additional achievements. | This employee’s work regularly meets the department’s standards and expectations for performance; periodically it may exceed these standards. This rating reflects a determination that the employee makes a solid and positive contribution to the department. | This rating is appropriate when an employee periodically meets the standards but too often does not do so, which negatively impacts the overall performance level. The employee must improve their efforts, knowledge, performance, skills, and/or behavior in order to achieve a satisfactory level of evaluation. | The employee’s performance is consistently deficient, unacceptable, and seriously impacts job outcomes. ***Immediate action by the employee to improve performance is required.*** |
| Comments/Examples: | | | | |

***Employee Comments (Optional)* - This section may be used to provide feedback to your supervisor on what can be done to assist you in performing your job. For example, you could address training or equipment needs, safety issues, improvements to policies and/or procedures, etc.**

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| Comments: |

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| --- | --- |
| **Employee’s Signature:** | **Date:** |
| This performance evaluation has been completed to assist you in your job performance and development. Your signature does not necessarily imply that you agree with the comments or rating, but that your supervisor has reviewed the document with you. | |
| **Supervisor’s Signature:** | **Date:** |
| **Principal Investigator/Director Signature:** | **Date:** |
| **Vice President/Dean’s Signature (if required)** | **Date:** |
| **Human Resources** | **Date:** |