

**PERFORMANCE REVIEW AND DEVELOPMENT PLAN
OVERVIEW
(Management/Supervisory)**

- The Performance Development System is designed to be a reminder of what is expected of you as a manager, to provide you with a clear understanding of how to be successful, and to provide regular feedback regarding your job performance and professional development.
- The Performance Development System is a continuous and shared communication process between you and your Vice Chancellor that focuses on your individual development as a manager. Your Vice Chancellor will act as a coach, helping you improve your performance. You will:
 - a) discuss your goals together;
 - b) assess your own performance and progress; and
 - c) identify and implement changes to improve performance.
- Your obligation under the Performance Development System is to fulfill the primary functions of your job (see attached primary functions) and complete the goals that you and your Vice Chancellor establish for you and your unit in a manner that reflects high-quality service.
- To help you understand what constitutes high-quality service for each primary function and each goal, performance standards have been established. Performance standards are the criteria that define high-quality performance.
- The performance cycle begins each July 1, after you and your Vice Chancellor have developed your specific goals for the fiscal year. These goals are the summary of the major accomplishments that you plan to achieve during the year. The goals are supported by strategies that you will employ to achieve the goals. To the extent possible, goals should be tied closely to the Strategic Objectives for Indiana University Southeast. The development of goals is a collaborative effort between you and your Vice Chancellor; development of specific strategies to achieve these goals will generally be your responsibility.
- The Vice Chancellor, in the interest of gathering information, will periodically give staff the opportunity to give feedback on management performance as well.
- At least semi-annually, you and your Vice Chancellor will review your progress and overall performance.

IU SOUTHEAST
PERFORMANCE REVIEW AND DEVELOPMENT PLAN
Management / Supervisory
(Attach primary functions and current goals update)

Process:

- 1) Supervisor completes performance review/development plan.
- 2) Employee also completes performance review/development plan.
- 3) Both parties will review primary functions and update as appropriate.
- 4) Work and personal development goals will be established and jointly reviewed in the first month of the evaluation period.
- 5) Supervisor will meet with employee midway through the evaluation period to discuss performance.
- 6) Supervisor will meet with employee at the end of the evaluation period to formally discuss, evaluate and develop new goals.
- 7) All documents will be considered part of the review and development plan.
- 8) Performance Review and Development Plan will be filed in departmental file.

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Management / Supervisory
PERFORMANCE REVIEW AND DEVELOPMENT PLAN

Fiscal Year: _____

(Attach primary functions and current goals update)

POSITION TITLE: _____ **GRADE/CLASSIFICATION** _____

EMPLOYEE: _____

SUPERVISOR: _____

EVALUATION DATE: _____

Evaluation of Performance

Please comment on performance in the following areas for the appraisal period.

JOB KNOWLEDGE:

Demonstrates knowledge of techniques, principles, procedures etc. required for effective job performance. Performs competently in functional areas. Demonstrates knowledge of how the job interacts and supports other areas of the university.

Comments:

INITIATIVE:

Takes action; gets things done; plans work goals; requires little monitoring; problem-solving/defines alternative solutions to overcome obstacles; accepts responsibility/"owns" problems.

Comments:

LEADERSHIP AND MOTIVATION:

Creates and maintains an effective and motivating environment where people strive for quality of service and is supportive of all staff; fosters a commitment for achieving Unit and University goals; sets a positive example for others to follow.

Comments:

PERFORMANCE MANAGEMENT:

Delegates effectively; clarifies expectations; provides feedback; implements performance review; commits to the development of people; establishes effective communication and team building mechanisms.

Comments:

SERVICE ORIENTATION:

Is responsive to external and internal clients; works well in a team environment; respects other individuals; communicates well, listens actively and responds appropriately; engages in conflict productively; commitment to individuals/the organization/the institution.

Comments:

RESOURCE UTILIZATION:

Establishes priorities; identifies opportunities to enhance resources through partnerships and funding initiatives; seeks and implements ways to optimize available resources and achieve measures of cost containment; ensures planning and staffing of the unit is appropriate; uses staff creatively to solve staffing shortages.

Comments:

PROFESSIONAL GROWTH:

Engages in self-directed, life-long learning; establishes targets for professional growth and advances toward them; engages in opportunities to broaden skills; enhances further employability.

Comments:

INNOVATION:

Seeks ways to improve quality at IUS; assesses the value of new opportunities and ideas; demonstrates a willingness to adapt and change.

Comments:

JUDGMENT:

Considers impact of actions in advance and chooses most appropriate course of action based on available information; knows when to act on own and when to seek guidance; takes initiative when appropriate.

Comments:

OTHER: _____

SPECIFIC PROJECTS OR INITIATIVES *(completed within the appraisal period):*

GOAL SETTING:

*Supervisor and staff member together should define and plan objectives for the next appraisal year.
Then, this component can be completed after the discussion by employee and his/her supervisor.*

ORGANIZATIONAL AND PERSONAL GOALS:

WAYS SUPERVISOR WILL HELP ACHIEVE THESE GOALS:

OVERALL SUMMARY:

Please check one:

_____ The employee and supervisor are in agreement with the performance appraisal results.

_____ The employee and supervisor are not in agreement with the performance appraisal results. If not agreed, area(s) of disagreement are indicated below.

SIGNATURES REQUIRED:

Supervisor

Date

Employee

Date