

PERFORMANCE REVIEW AND DEVELOPMENT PLAN OVERVIEW (Staff)

- The Performance Development System is designed to be a reminder of what is expected of you as a staff member, 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 supervisor that focuses on your individual development as a staff member. Your supervisor 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 supervisor 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 supervisor have discussed your performance and developed your specific goals for the year. 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 supervisor; 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 supervisor will review your progress and overall performance.

IU Southeast
Performance Review and Development Plan
(Staff)

(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 and in the Human Resources Department.

IU SOUTHEAST
Staff
Performance Review and Development Plan
(Attach primary functions and current goals update)

Employee Name:

Last	First	Middle
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Department

Job Title

Supervisor's Name

Date of this Evaluation

From _____ To _____

Current Evaluation Period

Date of Last Evaluation

LEVELS OF PERFORMANCE – DEFINITIONS

- (E) Exceed Standards** – Significant and clearly identifiable contributions beyond the primary functions of the job.
- (M) Meets Performance Standards Fully** - Consistently dependable and competent performance of the primary functions of the job.
- (N) Needs Improvement to Meet Standards** – Performance does not meet minimum performance standards and is not good enough to warrant recognition or greater responsibility.

**DEMONSTRATES COMPETENCE IN
PERFORMANCE STANDARDS**

Knowledge of Work

- Uses knowledge of job fundamentals, techniques, principles and procedures to perform the job effectively and competently.
- Seeks to learn new technologies and processes to enhance work performance.

Rating _____ Detailed Comments/Examples

Quality of Work

- Emphasizes a high standard of excellence in all work endeavors.
- Completes tasks / projects / assignments.
- Completes all aspects of work.
- Is attentive to detail / accurate.
- Meets deadlines.
- Generates appropriate quantity of work.

Rating _____ Detailed Comments/Examples

Judgment

- Considers impact of actions in advance and analyzes information to choose most appropriate action.
- Knows when to act on own and when to seek guidance.
- Takes initiative when appropriate.

Rating_____Detailed Comments/Examples

Planning and Organization

- Establishes an appropriate course of action to complete projects/assignments.
- Prioritizes work to ensure it is completed on time.

Rating_____Detailed Comments/Examples

Service/Relationships with Others

- Is responsive to external and internal clients.
- Relates positively and cooperatively with co-workers.
- Interacts positively and cooperatively with supervisors.
- Relates positively and cooperatively with subordinates.
- Relates positively and cooperatively with students.
- Interacts positively and cooperatively with all customers to accomplish work and provide services.
- Treats others with respect and courtesy.

Rating_____Detailed Comments/Examples

Independence

- Performs required tasks / projects / assignments well with minimum supervision.

Rating_____Detailed Comments/Examples

Communications

- Expresses ideas in individual or group situations.
- Ensures message content is clear, concise and easily understood.
- Adapts message for audience.
- Listens actively, so as to identify problem and respond with appropriate answer.

Rating_____Detailed Comments/Examples

Attendance

- Conforms to scheduled work hours.
- Uses sick leave and vacation in appropriate manner.

Rating_____Detailed Comments/Examples

Safety

- Adheres to any identified safety standards.

Rating _____ Detailed Comments/Examples

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.

WORK AND PERSONAL DEVELOPMENT GOALS:

WAYS SUPERVISOR WILL HELP ACHIEVE THESE GOALS:

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