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Jewish Family Service Employee Development Plan

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University of San Diego

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Governance Project

Brenda Bothel, Karen Gould, and Dorothy L. O'Hagan

University of San Diego

Nonprofit Management Fundamentals

EDLD 501

Pat Libby & Mary McDonald

December 15, 2008

Jewish Family Service Employee Development Plan

One of the requirements for students enrolled in the Nonprofit Management

Fundamentals course at the University of San Diego (USD) is to establish a working relationship with a nonprofit organization and complete a governance project. Working as consultants on behalf of the USD Nonprofit Leadership program, Brenda Bothel, Dorothy O'Hagan, and Karen Gould partnered with Jewish Family Service (JFS) in San Diego, California to redesign and implement a new employee performance evaluation process. The following pages document the steps taken and research used by the USD consulting team in order to come up with a new employee evaluation process for JFS which will be referred to as the Employee Development Plan.



Our Mission

Strengthen the individual, enhance the family, protect the vulnerable, with human services based on Jewish values, Since 1918

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December 3, 2008

Ms. Pat Libby
University of San Diego
Nonprofit Leadership and Management Program
5998 Acala Park
San Diego, CA 92110

Dear Ms. Libby:

I want to take this opportunity to let you know what an excellent job Brenda Bothel, Karen Gould and Dorothy O'Hagan did for Jewish Family Service of San Diego, "JFS". This team, who are in the EDLD 501 – Fundamentals of Nonprofit Leadership and Management class, are true role models for leadership in action.

JFS has not performed employee evaluations in two years. We wanted to implement a better system to evaluate, mentor and foster a more meaningful experience for our employees. Brenda, Karen and Dorothy helped JFS reach the next level in our approach to employee evaluations and development.

The amount of research the team did was evident in the professional presentation backed up with supporting data that will enable us to move forward with a new Employee Development Plan, "The Plan." The team worked closely with staff and came back to JFS with a development plan which is far superior to anything we have used in the past. They presented the development tool in both Word and Excel for easy use by staff. They also developed a training presentation for senior staff to use in the roll out of The Plan.

We did the first presentation of The Plan to management staff at our monthly meeting and all were impressed with the new plan and the ease of use. The development tool will be used by all employees starting December 15, 2008. This partnership was truly a wonderful success.

Sincerely,

Guinevere A. Kerstetter Chief Financial Officer

Jewish Family Service of San Diego

Juneire Q. Kentitte

Turk Family Center

8804 Balboa Avenue

San Diego, CA 92123-1506

tel 858 637 3000

fax 858 637 3001

www.jfssd.org











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Celebrating 90 Years

Jewish Family Service

One Source for a Lifetime of Help



Special Programs/Services

- Adoption Alliance (adoptionalliancesd.org): International homestudies, post-placement studies, parent education, consultations, groups, referrals
- Chaverim: Matches Jewish individuals diagnosed with mental illness with Jewish adult mentors (858) 637-3010
- Economic Crisis Response: Offering support and networking groups, workshops, and forums for those struggling with financial crisis (858) 637-3392
- Fire Support: Long-term recovery assistance for individuals and families affected by the San Diego wildfires of 2007 (800) 295-4254
- Hand Up Youth Food Pantry: Distributes food to low income and homeless individuals and families at multiple sites in San Diego County. Provides a unique opportunity for youth and groups to volunteer in the pantry
- HFLA (Hebrew Free Loan Association) & Argen Loan:

Assists individuals in the Jewish community to become self-supporting through interest-free loans (858) 637-3228

- HIV Services: Intervention Case Management, psychiatric and counseling services for HIV+ individuals with substance abuse problems
- Jewish BIGPals: Matches Jewish boys & girls from single parent and non-traditional families with adult mentors (858) 637-3090
- Patient Advocate: Protects the rights of individuals living with mental illness
- Project CHAI (Creating Hope, Advocacy & Inclusion): A Jewish social and educational group for adults (18+) with developmental and physical disabilities. (858) 637-3010
- Project SARAH (Stop Abusive Relationships at Home): Family abuse services, outreach. education, crisis intervention, and counseling (858) 637-3200
- Russian Jewish Community Services: Provides Jewish education, community building, and care management for Russian Jewish community.....(858) 637-3228
- Supporting Jewish Single Parents (supportingjsp.org): Advocacy, support, connection within the Jewish community (858) 637-3080
- Talking About Tina: Support group in English and Spanish for men who use methamphetamine and are HIV+ or at high-risk of contracting HIV.....(858) 637-3020

ABOUT JFS

Jewish Family Service of San Diego (JFS) was founded in 1918 by a consortium of women's clubs who sought to address the myriad of human needs of the time. Today, JFS is a comprehensive human services organization with locations throughout San Diego County and in Palm Springs. From its early grassroots origins, the agency now serves more than 30,000 people annually. Discover upcoming events, more information about programs, and why JFS is One Source for a Lifetime of Help at www.jfssd.org.

OUR MISSION: Strengthen the individual, enhance the family, protect the vulnerable, with human services based on Jewish values.

President, Board of Directors Ron S. Zollman

Chief Executive Officer Jill Borg Spitzer, ACSW, LCSW

Case Management Services

- Crisis Case Management Assistance with emergent needs such as food, transportation, finances, shelter, medical/dental resources, and employment. Also responds to sudden family or individual crisis situations
- Psychiatric Case Management For individuals diagnosed with a mental illness who need assistance with basic needs, funding issues, advocacy, supportive intervention and management of daily living
- Intensive Psychiatric Case Management -Serves Jewish clients diagnosed with a mental illness by assisting them with managing their symptoms, connecting them with appropriate community resources, closely monitoring their status and maximizing their ability for independent living
- Military Outreach Provides supplemental food and emergency financial assistance to low-income active duty military and their families

Client Intake and Information. . . (877) 537-1818

Client Intake and Information... (877) 537-1818

Counseling

Individual (child/adolescent/adult), couples, family, and group treatment; and psychological testing available in Kearny Mesa, Encinitas, Rancho Bernardo

• Mood Disorder Program

Counseling Services

Specialized counseling and support groups for Jewish individuals who are dealing with depression, bipolar disorder, anxiety, or other mood disorders

• Support Groups

Available at several locations throughout SD County Separation & Divorce, Female Survivors of Family Violence, Psychotherapy Group for Men & Women, Prepare for Marriage Program, Women in Transition

• Ombudsman Program

Provides advocacy services for residents of Edgemoor Skilled Nursing Facility for seriously ill individuals requiring a high level of care (858) 637-3355

Donation Programs

- Furniture Donation Program: Accepts furnishings of any kind (24 hours-7 days a week)
-(619) 563-5232 • CARS (Charitable Auto Resources):
- Turn your car into care—Vehicle donation program benefiting JFS..... (877) JFS-GIVE
- Ways to Give: Learn more about the JFS annual campaign, Friends of the Family, endowment funds, and estate gifts

Coachella Valley Shelter Services

 Coachella Valley Services and Overnight Shelter (CV-SOS) Program: A shelter and case management program for

situational homeless

- Desert Horizons SOS: Transitional housing and supportive services for homeless individuals
- Nightengale Manor: An emergency shelter for families with children

Jewish Family Service

One Source for a Lifetime of Help

www.ifssd.org

Older Adult Services

Intake, Information, and Referral for all Older Adult Programs (858) 637-3040

Turk Family Center

- Geriatric Care Management: Provides comprehensive assessment, plan of care, coordination of services, consultation, advocacy and referral(858) 637-3040
- Serving Older Holocaust Survivors
 Program (SOS): Provides care
 management, home care, and emergency assistance
 services for low-income Jewish Holocaust survivors
 (858) 637-3040

CO-OP

(Creating Opportunities for Older Persons)

Support for communities aging in place
Town Park Villas (858) 453-0182
Creekside Meadows (619) 445-2480

College Avenue Older Adult Services

(Located at Beth Jacob Congregation)

- Older Adult Activity Center: (Monday—Friday, 8:00am—4:00pm)
 Daily activities, weekly outings, exercise, computer classes, and hot kosher lunches (619) 583-3300
- **Senior Nutrition:** Kosher kitchen and lunch programs(619) 286-1543
- **Foodmobile:** Home delivered kosher meals and friendly visits to seniors and younger homebound disabled adults (619) 229-2390
- **JFS Fix-it Service:** Free home repairs for low-income seniors . . . (619) 583-3300, x321

North County Inland Older Adult Center

(Located at Temple Adat Shalom)
(Monday & Wednesday, 10:00am—3:00pm)
(Thursday, 10:00am—12:00pm)
Daily activities, classes, discussions, and hot kosher lunches......(858) 674-1123

University City Older Adult Center

(Located at Congregation Beth Israel)
(Tuesday-Thursday, 10:00am—2:00pm)
Daily activities, classes, discussions, and
hot kosher lunches (858) 550-5998

On the Go......(877) 63-GO-JFS (46-537)

- Rides & Smiles® individual transportation by volunteer drivers to necessary medical and personal appointments
- On the Go Shuttles group transportation to shopping destinations, JFS Older Adult Centers, synagogues, Jewish Community Center
- On the Go Excursions group transportation to organized activities and community events

Volunteer Services

Volunteers are the heart of JFS and provide administrative assistance and direct service (858) 637-3050

Parenting and Youth Services

Information on all Parenting and Youth Services(858) 637-3300

- Golden Hill: An on-site, school-based counseling program geared toward at-risk-youth at Golden Hill Elementary
- CHAMP (Children Are More Protected):
 A school-based child abuse prevention program and parenting classes
- Foothills Teen Family Program:
 A collaborative program designed to support

A collaborative program designed to support the health, well-being, and education of teen parents and their children, located in San Marcos

- Let's Play: An intergenerational program that helps parents realize the importance of their role as teachers. Older adult volunteers make home visits to families with preschool-age children
- **Mentoring Mothers:** Matches mature adult women with teenage mothers attending school
- JFS Parent Education: Provides parent education for parents with children ages 5-adolescence
- Peaceful Parenting: Provides parent education, coaching, and early learning support for parents with children ages 0-5
- **Preschool in the Park:** A school readiness program for residents of Escondido and San Marcos with children ages 1–4
- Youth Assessment and Development (YAD):
 An early intervention program for Jewish preschools that provides support to children, parents, and teachers

Jewish Healing Center

Provides resources for the spiritual well-being of the Jewish community... (858) 637-3070

Bikkur Holim—Friendly Visitor Program:
 Sends friendly visitors to the isolated Jewish elderly and ill (858) 637-3071

• CCLC—Caring Community Living with Cancer: Support groups for those affected by cancer and their loved ones (858) 637-3070

Refugee Resettlement Services

- **Refugee Resettlement:** Financial support, job readiness, and acculturation (858) 637-3030
- Family Strengthening: Promoting healthy relationships and marriages in refugee communities (858) 637-3359
- **Shalom:** Monthly Russian magazine(858) 637-3082
- **Prins Program:** Pro-bono legal assistance for new asylum seekers (858) 637-3038

Office Locations

Monday – Thursday, 8:30am – 5:00pm Friday, 8:30am – 4:00pm

Headquarters - Turk Family Center

P (858) 637-3000 • F (858) 637-3001 8804 Balboa Avenue San Diego, CA 92123

North County Coastal Office

P (858) 637-3300 • F (858) 637-3301 285 N El Camino Real #218 Encinitas, CA 92024

North County Inland Office

P (858) 674-6441 • F (858) 674-6491 16486 Bernardo Center Drive #268 San Diego, CA 92128

Integrated Services Program

P (619) 325-0522 • F (619) 325-0408 2700 Adams Avenue #102 San Diego, CA 92116

Patient Advocate

P (800) 479-2233 2710 Adams Avenue San Diego, CA 92116

College Avenue Older Adult Services

P (619) 583-3300 • F (619) 583-3303 4855 College Avenue • San Diego, CA 92115

North County Inland Older Adult Center

P (858) 674-1123 • F (858) 674-1124 15905 Pomerado Road • Poway, CA 92064

University City Older Adult Center

P (858) 550-5998 • F (858) 550-5997 9001 Towne Centre Drive San Diego, CA 92122

CO-OP (Creekside Meadows)

P (619) 722-1200 • F (619) 722-1331 1750 Arnold Way Alpine, CA 91901

CO-OP (Town Park Villas)

P (858) 453-0182 • F (858) 453-1601 6316 Gullstrand Street San Diego, CA 92122

On the Go

P (877) 63-GO-JFS • F (619) 220-8498 2525 Camino Del Rio South, Suite 265 San Diego, CA 92108

Rides & Smiles®

P (858) 391-0033 • F (858) 391-0033 13094 Civic Center Drive Poway, CA 92064

Desert SOS Office

P (760) 327-4394 • F (760) 327-4516 1733 N. Palm Canyon Dr., Suite A Palm Springs, CA 92262

Nightengale Manor

P (760) 318-0071 • F (760) 318-0779 2951 N De Anza Road Palm Springs, CA 92262

CV-SOS Office

P (760) 251-1500 • F (760) 251-1550 19531 McLane St Palm Springs, CA 92258



JFS Employee Development Plan Process Outline

Step One:

Meet with team to distribute Employee Personal Review

- Explain Employee Development Plan process
- Distribute updated Job Description
- Employees turn in Personal Review to their supervisors

Step Two:

Supervisors complete Employee Development Plans

- Directors must review completed plans with coordinators before their individual meetings with employees
- Directors/Coordinators schedule individual meetings with employees
- Provide the employee with the completed Employee Development
 Plan one day before the meeting. Do not give out on a Friday
- Review Job Description with employee, make changes as needed
- Employee Development Plan need to be completed and signed by supervisor and employee

Step Three:

Once Employee Development Plans are completed

- Provide employee with one copy
- Keep a working copy for your file
- Update Job Description, send electronically to HR
- Senior Director signs and returns originals for entire department along with personnel update forms to Human Resources, including:
 - Personnel Update
 - Updated copy of Drivers License
 - Updated copy of Car Insurance
 - Updated copy of professional license (if applicable)
 - Pre-designation of physician for Workers Compensation (if desired)

Step Four:

Schedule meeting to review "Progress Towards Goals" (6 months later)

- Check-in on goals and continuing education and/or training
- Note any progress or agreed upon changes
- Turn in to Human Resources with signatures
 - Employee
 - Supervisor
 - Senior Director

Employee:	Job Title:
Department:	Review Period:



Employee Development Plan

Completed Annually or 90 Day for New Hires

Instructions:

Effective supervision of job performance is an on-going process. Annually each supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used annually or after the first 90 days of employment at JFS, to set up a development plan and semi-annually during the year to check in with progress.

Part I - Job Success Factors

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above.

Part II - Last Period's Goals

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Next Period's Goals

Enter the performance goals for the next period to be reviewed. Individual goals and objectives should align with those of the job description and professional growth.

Part IV - Continuing Education and/or Training

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

Part V - Progress towards Goals

Review employee development plan twice yearly. Note progress and any agreed upon changes.

Rating Scale*:

EE Exceeds expectations

Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met and/or exceeded.

ME Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

IN Improvement needed

Performance did not *consistently* meet expectations – performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A specific plan to improve performance must be outlined in Section IV, including timelines, and monitored to measure progress.

^{*}The inclusion of goals is typically a consideration in assessing the overall rating.

Employee:	Job Title:
Department:	Review Period:

Part I. Job Success Factors

Factors Rating Comments (Check Box)

	(Cite	CK DC	'^ <i>)</i>	
EMPLOYEE COMPETENCIES	EE	ME	ÍN	
1. Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others				
2. Stewardship & Managing Resources Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines. Understands and creates or follows budgets and regulatory mandates from funders				
3. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges				
4. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions				
5. Organization & Efficiency Achieves agency assignments within timelines and resources; scopes, plans and schedules work; sets priorities and goals; anticipates and adjust for problems; evaluates workloads; follows-up on assignments; measures and evaluates performance against goals				
6. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively				
7. Quality improvement Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements				
8. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others				
9. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible				
10. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided				

Employee:	Job Title: Review Period:
11. Strategic Planning Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to redirect as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; can see connection within complex issues	
12. Managing People Coaches, evaluates, develops, inspires people; sets expectations, recognizes achievements, manages conflict, aligns performance goals wit agency goals, provides feedback, group leadership; delegates	n
13. Clinical, Technical, and/or Business Skills Possesses the clinical, technical and/or business knowledge and skills to do the job at a high level of accomplishment. Applies skills effectively; picks up and learns new skills quickly; keeps up with new technology; demonstrates interest in and accountability to the functions of the job	

Part II. Last Period's Goals

Rate the progress made on each of the goals established at the beginning of the period that are contained in last year's job description and/or any new goals established prior to this review. Note any modifications to the original goals.

Part III. Next Period's Goals	
Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those in the job description and areas of professional growth.	
Goal #1	
Measure of success:	
Goal # 2	
Measure of success:	
Goal #3	
Measure of success:	
Goal #4	
Measure of success: Goal #5	
Goal #3	
Measure of success:	
Progress toward meeting these goals will be reviewed semi-annually.	
Part IV. Continuing Education and/or Training	
rarety. Continuing Education analor training	
Tarriv. Continuing Education and/or Training	
Tartiv. Continuing Education and/or Training	
Tarriv. Continuing Education and/or Training	
Tartiv. Continuing Education and/or Training	
Tarriv. Continuing Education and/or Training	
Signatures:	
Signatures: Employee: My signature indicates that I have received a copy of this plan.	
Signatures: Employee: My signature indicates that I have received a copy of this plan. Supervisor: Name:	
Signatures: Employee: My signature indicates that I have received a copy of this plan.	
Signatures: Employee: My signature indicates that I have received a copy of this plan. Supervisor: Name: Signature: Date: Date: Senior Director: Name:	
Signatures: Employee: My signature indicates that I have received a copy of this plan. Supervisor: Name: Signature: Date: Date:	

Employee:
Job Title:

Department:
Review Period:

The employee is to receive a copy of the completed development plan and one copy shall be placed in the personnel file.

Meet semi-annually with employ	Part V. Progress towards Goals eyee and review progress towards job success factors, goals, and Note the date of meeting, discussion points, and signatures in area needed, attach another page.	
Date:		
Discussion Points:		
Signatures:		
	Date:	
Cunamiaan Nasa		
Signature:	ne: Date:	
Senior Director:	Name:	
Signature:	Date:	
The employee is to reco	aive a convert the completed progress towards goals and a	200

 Employee:
 Job Title:

 Department:
 Review Period:

The employee is to receive a copy of the completed progress towards goals and one copy shall be placed in the personnel file.

Employee:	Job Title:
Department:	Review Period:



Employee Personal Review

Part I. Job success factors:

Preparation of the employee development plan is an interactive process where there is an exchange of information between you and your supervisor. Please provide your supervisor with information related to your performance in any of the job success factors noted below.

EMPLOYEE COMPETENCIES	Comments
1. Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others	
2. Stewardship & Managing Resources Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines. Understands and creates or follows budgets and regulatory mandates from funders	
3. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges	
4. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions	
5. Organization & Efficiency Achieves agency assignments within timelines and resources; scopes, plans and schedules work; sets priorities and goals; anticipates and adjust for problems; evaluates workloads; follows-up on assignments; measures and evaluates performance against goals	
6. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively	
7. Quality improvement Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements	
8. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others	
9. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible	

Employee:	Job Title:
Department:	Review Period:
10. Service focus Values the importance of delivering high quality, innovative service to	
internal and external clients; understands the needs of the client;	
customer service focus; shares accountability for results provided	
44 Ctratagia Planning	
11. Strategic Planning Understands big picture and aligns priorities with broader goals, measures	
outcomes, uses feedback to redirect as needed, evaluates alternatives,	
solutions oriented, seeks alternatives and broad input; can see connections within complex issues	
12. Managing People	
Coaches, evaluates, develops, inspires people; sets expectations,	
recognizes achievements, manages conflict, aligns performance goals with agency goals, provides feedback, group leadership; delegates	
13. Clinical, Technical, and/or Business Skills Possesses the clinical, technical and/or business knowledge and skills to	
do the job at a high level of accomplishment. Applies skills effectively;	
picks up and learns new skills quickly; keeps up with new technology; demonstrates interest in and accountability to the functions of the job	

Part II. Goals:

Provide an assessment of your success in reaching the goals set at the beginning of the last review period.

Goal	Comment
1.	
2.	
3.	
4.	
5.	

Parts III and IV. Next Period's Goals and Training/ Education

Describe goals that you would like your supervisor to consider. Include training and other development activities that you believe are relevant to achieving these goals and important to your job performance.

Employ	ree:		Job Title:	
Departi	ment:		Job Title: Review Period:	
Part V.	Employee Feed What changes i effectiveness?	in the nature of your pos	sition could be made to impro	ve your
•	List any person	าลl and/or professional ส	accomplishments you would l	ike to share:
•	What suggestic	ons do you have in rega	rd to Jewish Family Service as	s a whole?
Comme List any review.	topics, issues, o	or problem areas that you	wish to discuss with your superv	risor during your
Signatu	ı <u>re:</u> Employee:		Date:	

Jewish Family Service of San Diego Management Meeting Agenda December 2, 2008 8:30 a.m.-10:30 a.m.

TIME	PRESENTER	AGENDA ITEM
		Minute Taker: Marcie Lucas
5 min	Alan	Approval of Minutes from November 4, 2008
5 min	Etleva	Story / Client Letter
10 min	Linda	CQI Presentation Schedule
15 min	Sally M.	Emergency Response – staff home phone numbers Facility – Agency-wide cleanup effort; parking at TFC; kitchen duty [TFC only]
15 min	Cheryl	Internal cross referral
10 min	Helene	New Hires
40 min	Helene & Brenda	Employee Development Plan
30 min	Debra	CQI: Community Case Management
		Inreach Coordination
		Discussion Items

NEXT MANAGER'S MEETING: JANUARY 6, 2009



Employee Development Process

Presented by:
Brenda Bothel and Helene Sherman

December 2, 2008

JFS Mission



Strengthen the individual, enhance the family, protect the vulnerable, with human services based on Jewish values.

Process Objectives



- Create a living, evolving development tool
- Use to align supervisor and employee on goals, results and next steps
- Involve employees in designing, delivering and assessing their work
- Identify strengths and areas of opportunity
- Create a user-friendly document and process



Employee Development Plan (EDP)

Employee Development Plan



- What it is not:
 - This is not an evaluation
- What it is:
 - Structured feedback meetings between supervisor and employee
 - Opportunity to align on goals and projects
 - Discussion of strengths and training opportunities related to job skills
 - Identification of progress made and/or corrective actions that need to be taken

Key Elements of the Employee Development Plan



- Five components of the Development Plan
 - Job Success Factors
 - Last Period's Goals
 - Next Period's Goals
 - Continuing Education and/or Training
 - Progress Towards Goals
- Employee Personal Review
- New Rating System

Rating



- Rating system is not a "grade" or "score'
- Rating system summarizes whether or not employee is on track
 - Exceeds Expectations (EE)
 - Meets Expectations (ME)
 - Improvement Needed (IN)
- Ratings applied to goals and job success factors

Exceeds Expectations



- Exceeds expectations in ALL essential areas of responsibility
- Quality of work overall was excellent
- Annual goals were met and exceeded

The employee consistently goes above and beyond in the skill or goal

Meets Expectations



- Consistently met expectations in all essential areas of responsibility
- At times exceeded expectations
- · Work overall was very good
- Most critical annual goals were met

The employee is doing a good job in the skill or goal

Improvement Needed



- Performance did not consistently meet expectations
- Failed to meet expectations in one or more essential areas of responsibility
- One or more of most critical goals were not met

Requires documentation with specific actions and timeline to monitor progress



Components of the Employee Development Plan

Part I: Job Success Factors



- 13 skills and basic competencies related to measurable objectives in job description
 - Rating: indicate with "x"
 - Comments: write strengths or opportunities for growth
- If the Job Success Factor doesn't apply to employee, note "N/A" in Comments section
- Specific comments <u>must</u> be written for ratings of "EE" or "IN"

Part II: Last Period's Goals



- Rate progress made on previous goals
 - Rating: indicate with "x"
 - Comments: results, accomplishments, next steps, etc
- Supervisors need to ensure that employees know which goals will be reviewed
 - Measurable Objectives from job description
 - Goals established in last review
- Specific comments <u>must</u> be written for ratings of "EE" or "IN"

Part III: Next Period's Goals



- Identify goals for the next period
 - Measurable goals from job description
 - Employee's professional growth goals
- Include measure of success
- Must be discussed and agreed upon with employee

Part IV: Continuing Education and/or Training



- Actions that will be taken by employee and/or supervisor to support:
 - Upcoming Goals identified in Part III
 - Job Success Factors identified in Part I
- May include career growth, job mastery or actions to correct performance

Part V: Progress Towards Goals



- What it is:
 - A six-month review of Employee Development
 Plan with employee to ensure on track
 - Note any progress or agreed upon changes
- What it is not:
 - A time to re-do entire Employee Development Plan, ratings, goal setting, etc.

Employee Personal Review



- Increases employee engagement
- A help to supervisor when completing the Development Plan
- An employee's time to "shine"
- Similar structure as Employee Development Plan but without ratings
- Open-ended questions for feedback about job and organization

Timeline



- December 3rd Begin meeting with teams to distribute Employee Personal Review
 - Explain new Employee Development Plan process
 - Distribute updated job description
- On or before December 15th Employees turn in Personal Review to their supervisors

Timeline



- December 16th through January 14th:
 - Supervisors complete Employee
 Development Plans
 - Directors must review completed Plans with coordinators before their individual meetings
 - Directors/Coordinators schedule individual meetings with employees

Important Note



Provide the employee with the completed Employee Development Plan one day before the meeting.

Do not give out on a Friday.

Timeline



- January 15th Employee Development Plans need to be completed and signed by supervisor and employee
 - Provide employee with one copy
 - Keep a working copy for your file
 - Senior Director signs and returns originals for entire department along with personnel update forms to Human Resources

Additional Documents Due Jan. 15, 2009



- Turn in to Human Resources with the completed Employee Development Plan
 - Personnel Update 2009
 - Updated copy of Drivers License
 - Updated copy of Car Insurance
 - Updated copy of professional license (if applicable)
 - Pre-designation of physician for Workers Compensation (if desired)

Timeline



- June/July Schedule meetings to review Progress Towards Goals (Section V)
 - Check-in on goals and continuing education and/or training
 - Note any progress or agreed upon changes
- Turn in to Human Resources with signatures
 - Employee
 - Supervisor
 - Senior Director



"Don't do annual reviews if that's all the time spent on performance management.

Performance management is about ongoing performance conversations

That's the only way to support improvement." Career Builder.

MEMORANDUM

TO: JFS Leadership Team

FROM: USD Consultants

Brenda Bothel, Dorothy O'Hagan, Karen Gould

RE: Recommendations to incorporate Employee Development Plan into

JFS policies and procedures

This Memorandum outlines our recommendations to incorporate the Employee Development Plan (EDP) into JFS policies and procedures. The most important topics include:

• JFS Personnel Practices Handbook

- Initial Training
- New Hires
- Biannual Review of Progress Towards Goals
- Annual Employee Development Plan Process
- Management Feedback

JFS Personnel Practices Handbook

The current JFS Personnel Practices Handbook addresses an initial introductory period of three months at the "Commencement of Employment" (Section J-1) and the "Employee Job Performance" (Section K). We suggest the following additions or changes in order to incorporate the new Employee Development Plan process:

Section J-1. Commencement of Employment

The current handbook makes no mention of a personnel review at the end of the three-month trial period. However, in the discussion with the JFS Leadership Team, we have determined that at the end of an employee's first three months, an initial EDP will be created to documents goals. Therefore, we suggest the incorporation of the following language after Paragraph Three:

"At this time, the supervisor shall meet with the employee to document the employee's goals and objectives in the Employee Development Plan format. In addition, the supervisor should review the job description with the employee to ensure that the documented objectives are relevant and to revise the job description, as needed. The employee and supervisor will both sign the EDP format, and a copy will be kept by the employee, supervisor and Human Resources."

Section K. Employee Job Performance

Given the change in the review process – from an "evaluation" to an "Employee Development Plan," we suggest creating new language which highlights this new focus. In addition, the current handbook states that "a performance review... will be a factor considered in determining any changes in compensation." However, the JFS Leadership has explicitly stated that the performance reviews are not tied to salary increases. Therefore, we suggest incorporating the following language (in bold) to the current section:

"The Agency wants employees who have the desire and the ability to perform their work properly and to produce quality work. To provide feedback in this regard, the Agency will conduct bi-annual Employee Development Plan meetings for supervisors and employees. The objective of the Employee Development Plan is to align on goals or projects, discuss strengths and training opportunities related to job skills, and to identify progress made or corrective actions that need to be taken. In addition, during the Employee Development Plan process, the employee's job description will be reviewed and revised, if necessary. If an employee's performance does not meet standards that are expected, the Agency will attempt to provide feedback about any such problems. Willful unsatisfactory job performance, excessive unsatisfactory job performance, or continued unsatisfactory job performance after being advised of said problems may result in an employee's termination. Unsatisfactory job performance may also result in written warnings and, if performance does not improve, probation or demotions. Nothing in this Handbook is intended to alter the at will status of employment with The Agency. Satisfactory performance reviews, increases in compensation, and the absence of discipline do not alter the at-will employment relationship."

Initial Training

On December 2, 2008, a 45-minute training session took place with the JFS Management Team. The training included the following points:

- Explanation of the objectives of the project that was undertaken to review and revise the evaluation process
- Employee Development Plan what it is and what it is not
- Components of the Employee Development Plan including a detailed review of the instructions, rating scale and each section in the EDP document
- Process steps, responsibles and timeline for December 2008/January 2009 review period
- Explanation of 6-month review of Progress Towards Goals
- Period for questions and open discussion

All documents reviewed in the management training were posted in a public folder so that supervisors can have access to the Employee Development Plan format, instructions and training presentation at any time.

New Hires

Three months after an employee is hired, Human Resources will contact the supervisor to fill out Section III. Next Period's Goals and, if applicable, Section IV. Continuing Education and/or Training. As should be documented in the Personnel Practices Handbook, the supervisor must provide a copy to the employee and Human Resources, and must keep a copy for their files.

Six-Month Review of Section V. Progress Towards Goals

The initial training for the Management Committee took place on December 2, 2008, with the process completion date on January 15, 2009. In June 2009, and every June thereafter, the Human Resources department will contact all supervisors to conduct the review of Section V. Progress Towards Goals. Human Resources should provide a 30-day time period in which the supervisor and employee review the Employee Development Plan and note any progress made or adjustments needed. In addition, if the employee job description needs to be updated, it should be done at this time. The supervisor must provide a copy of the signed Progress Towards Goals to the employee and Human Resources, and must keep a copy for their files.

Human Resources should be sure to clearly communicate the instructions for the sixmonth review. This should include a training session at the management meeting and through e-mail communication. In addition, Human Resources should post the specific instructions in the public folder. It is important that supervisors and employees understand that they are not re-doing the entire Employee Development Plan process, but are checking-in on the progress to date by completing Section V only.

Annual Employee Development Plan Process

In December 2009, and every December thereafter, the Human Resources department will contact all supervisors to conduct the annual Employee Development Plan process. At this time, supervisors and employees will review their performance during the previous year and set new goals for the upcoming year.

Human Resources should host a training refresher in the management meeting to ensure that all supervisors clearly understand the documentation and the process. In that training meeting, the discussion should include:

- Review instructions
- Review rating scale
- Review each section of the Employee Development Plan
- Timeline

All documents reviewed in the management training should be posted in the public folder so that supervisors can have access to the Employee Development Plan format, instructions and training presentation at any time.

Management Feedback

In February 2009, the management team will meet to debrief regarding the initial Employee Development Plan process that was completed on January 15, 2009. This meeting will be an opportunity for Human Resources to incorporate any comments or suggestions that will make the process more effective for future review periods. Some important areas of focus that should be discussed are how well the employees and supervisors understood the program objective, communication of process timeline, steps and instructions, supervisor reactions and employee comments.

In May 2009, Human Resources will meet with the management team to remind them that the six-month Progress Towards Goals will take place in June. Human Resources will communicate any adjustments made to the process according to the February debrief meeting.

Project Summary for Jewish Family Service

Employee Development Plan

Brenda Bothel, Dorothy O'Hagan, and Karen Gould

University of San Diego

EDLD 501

Pat Libby & Mary McDonald

December 15, 2008

In the fall of 2008, Jewish Family Service (JFS) partnered with University of San Diego Nonprofit Leadership and Management students Brenda Bothel, Dorothy O'Hagan, and Karen Gould to revise and develop a new employee performance evaluation process. Employees at JFS had not had a performance evaluation since January of 2007. For almost ten years, JFS had struggled with finding the right process for employee performance evaluations and had used four different forms during this time. This paper will discuss the consultation processes which lead to the development of an Employee Development Plan for JFS. The references used in this paper will be presented at the end of the complete project.

In the initial meeting with JFS, the consultants were told that the previous two evaluation forms used had gone from one extreme to another. The form used in 2005 and 2006 was abbreviated, used a rating structure of "A" through "E" that gave the impression of a school report card, did not allow for comments or feedback in most areas, and focused specific agency standards such as time, attendance, and dress code rather than employee skills.

After JFS leadership realized the form used in 2005 and 2006 did not meet the needs of the organization, a new form was developed. Rather than an abbreviated format, the new form was 10 pages long, asked 31 detailed questions as well as a series of open-ended questions. The feedback received after the January 2007 evaluation process was poor; leadership team members stated that the form was too time consuming and staff stated that the process was demoralizing. JFS leadership reported to the consultant team that some leaders had advocated with doing away with performance evaluations all together.

JFS leaders gave the consultants the following directives:

- evaluations were not tied to merit increase, nor would they be in the future
- the current evaluation process was too time-consuming

- evaluations were filed away and rarely referenced once completed
- one form would be preferred, but if necessary, they would consider using multiple based on the type of position

JFS leaders stated their desire was to create a process that promoted improved performance and communication between leadership and employees. Additionally, JFS wanted to incorporate the objectives identified in the employees' job descriptions into the evaluation. Having an avenue to formally document employee strengths and weaknesses was an important aspect of the employee performance evaluation for coaching, disciplining, and mentoring employees.

Having a grade or score on the evaluation had proved to be problematic; merit increases were not tied to the evaluation process so the grade seemed meaningless at all levels within the organization. Finally, the evaluation process needed to be a user-friendly process that was managed by front line Supervisors and Directors; Human Resources was not staffed to coordinate the process for nearly 225 employees. The Human Resources Director provided the consulting team with sample evaluation forms she had received back in 2006 from the AJFCA list-serve.

Based on the feedback received from JFS leadership, the consulting team spent three weeks researching articles, books, and sample performance evaluation forms. The Director of Human Resources had provided the consulting team with sample evaluation forms from similar organizations, so in addition to finding best practice examples, the team was able to review forms from like entities. The consultant team's University reader for the class provided sample evaluation forms which proved to be beneficial and the sample evaluation forms contained in the reader were used as reference points and resources.

According to Culbert (2008), the traditional thought of performance evaluations needs to be reconsidered. A common theme in the electronic reference material was in alignment with the Wall Street Journal Article by Culbert and advocated for a change in the traditional performance evaluation process. Culbert also stated that performance evaluations should be changed to "performance previews" and "previews are problem-solving, not problem-creating, discussions about how we, as teammates, are going to work together even more effectively and efficiently than we've done in the past" (So, What's the Alternative section, para. 3). The consulting team agreed with Culbert and began considering renaming the evaluation process and eventually ended up with the name "Employee Development Plan" which seemed to better suit the needs of JFS.

Changing the name of the evaluation was not the solution, but provided a way to reframe what the whole process was. This change in orientation meant that the evaluation would not focus solely on past performance, but rather uses past experience as a way to improve the future. Past experience needed to continue to be documented in employee evaluations so that these documents would be beneficial for disciplinary and/or legal issues. Finally, in addition to evaluating employee performance, the University Reader and class discussion with Professor Pat Libby indicated an organization should consider performing an organizational review as well as a review of the CEO or Executive Director of nonprofit organizations (Libby, 2002).

As a result of the research, the team returned to the client with three sample forms. After discussion, a unanimous decision was made to implement the Employee Development Plan. JFS leadership agreed with not only changing the name of the process, but changing the focus from evaluation to alignment. The new process would provide a form of structure for supervisors and employees to meet annually to align goals and objectives. Terms such as "action plan",

"growth" and "development" were the key phrases in conversation and the previous statements that the process was a waste of time were absent from the conversation. The Employee Development Plan would no longer be a one-sided grading session, but staff would complete an Employee Personal Review which would help increase employee engagement as supervisors and employees began discussing future personal and professional goals in lieu of past inadequacies and shortcomings.

The Employee Personal Review included three open-ended questions for the employee; (1) changes that would enable them to be more effective in their job, (2) suggestions for JFS as a whole, and (3) personal and/or professional accomplishments that they want to share. As stated in a class conversation with Professor Pat Libby, the consultants recommended that once the Employee Development Plan was complete, the supervisor would forward the completed plan to the employee one day prior to the one on one meeting so the employee would be able to come to the meeting prepared and would allow more time to be spent exchanging conversation and discussing the employee's development rather than just spending time reading the completed document.

To help the Employee Development Plan become a living document for JFS, the recommendation was made to incorporate a six-month check-in process to the plan. This meeting, called a "Progress Towards Goals check-in session", would be structured and provide a formal process for the supervisor and employee to review progress, document accomplishments, make any necessary adjustments, and update and/or modify the plan. The six-month check-in is an important component to reinforce the alignment objective of the program and does not require the supervisor and employee re-do the entire review process.

Employee job descriptions are important elements of the Employee Development Plan. The objectives stated in the job description need to be used as the basis for determining the employee's goals and measuring results. The objectives listed in the job description are also the basis for assessing the employee's performance in the Job Success Factors section of the development plan. Job Success Factors includes key skills that an employee needs in order to be successful in their role. Finally, as part of the Employee Development Plan process, the supervisor and employee need to review the employee's current job description and make any necessary updates and/or revisions so they may assure that the job description is also a living document.

In order for the Employee Development Plan to truly be a success, JFS must clearly communicate the new "alignment" philosophy to the organization. As part of this communication plan, the consultants prepared a training session with the entire management team to explain the objectives of and thinking behind the program, basically, what an Employee Development Plan is and what it is not, and the details of the process.

The final Employee Development Plan format included measuring the employee's accomplishments versus previously stated goals (Last Period's Goals), a review of skills important for success (Job Success Factors), establishing upcoming goals (Next Period's Goals), document additional training, education or necessary corrective actions (Continuing Education and/or Training) and a section for the six-month check-in (Progress Towards Goals).

There were several recommendations that were made to the client that they did not agree with or decided to delay. One important recommendation was that the Employee Development Plan should include an opportunity for the staff to evaluate the CEO and organization. The leadership team immediately rejected the CEO evaluation, although they were very interested in

the idea and had a long discussion about it. Instead, initially the leadership team wanted to do a Departmental Review and Organizational Review as part of the Employee Development Plan process. However, in the end the leadership team determined that they were not ready from a process and organizational perspective to conduct these reviews, and decided to postpone it as a future project that they intend to implement. The compromise was to include open-ended questions in the Personal Review where employees could give suggestions for JFS as a whole.

Another recommendation that was made was to tie the Employee Development Plan completion to the employee's anniversary date. The JFS management team decided that they do not have the staff necessary to track and coordinate different evaluation dates, and that it is more manageable for the entire agency to be on the same annual cycle.

The Employee Development Plan was a success, judging by the client's high-level of satisfaction with the final product that was delivered and by the initial response at the management meeting. The client expressed that they felt that the Employee Development Plan achieved the goal of providing supervisors and employees with a tool that would foster collaboration, growth and improved performance. Each member of the leadership team commented that they liked the ease-of-use of the format. In addition, they were pleased with the training materials provided and the implementation plan presented. The USD consulting team gave JFS a detailed roadmap to implement the process, resulting in confidence that the organization will obtain excellent results with the Employee Development Plan.



USD Evaluation Consulting Meeting October 20, 2008

Present: Brenda Bothel, Karen Gould, Dorothy O'Hagan, Guin Kerstetter, Alan Zamosky, Helene Sherman, Debra Stern-Ellis, Sheri Kirshenbaum

JFS OBJECTIVES:

- Use evaluations as staff development tool
- Identify strengths and weaknesses
- Should be a living tool for supervision of employees (what is working, and to document when things are not working)
- Self evaluation with a similar form for evaluation, prior to review with supervisor
- Include measurable objectives
- Take away numbers or grades
- Do not make it too long or cumbersome to fill out
- Needs to be a process that is manageable for the department manager; not a centralized HR person to coordinate whole process

WHAT DOES NOT WORK:

- Last evaluation was too long
- Get filed away and never referenced or used
- Process is not useful

TEMPLATE OPTIONS

- Change name
- Include specific measurable goals from job description
- Employee first puts their evaluation comments for goals and skills list.
 Includes feedback area for what they need from their manager to be more successful (or what is working well). Ratings are surpassing, meeting or below expectations
- Manager then puts their evaluation comments and what they need more from the employee (or what is working well)
- Manager and employee review together to discuss what they can do to best meet/improve goals with specific actions that will be taken

JOB RELATED SKILLS

 computer skills, accuracy/quality of work, quantity of work/productivity, teamwork, communication, attitude, follow policy/procedures, confidentiality, leadership, compassion, time management/prioritization, meeting deadlines, quick learner, creativity/innovation, professionalism, responsiveness, independent worker, management/delegation, budget, community relations, good judgment, reliable, responsibility, adaptability

Thoughts on Performance Evaluations Meeting with Alan and Joel 12/14/06

- 1) Three measurable goals evaluated
- 2) Non measurable tasks evaluated

Job skills

Computer skills

Work quality, accuracy

Work quantity

Organizational skills

3) Behavior evaluated

Teamwork

Communication (other EE, Mgrs, response to e-mails and phone)

Attitude

Following policy and procedure

Attire

Attendance

Confidentiality

Leadership

Compassion????

- 4) Strengths and areas of improvement
- 4) No merit pay limited scale (exceeds standards, meets standards, falls below standard)
- 5) Easy to Complete
- 6) As Objective as Possible (goal should be EEs, not Mgrs)
- 7) Process Evaluation continuous improvement on an individual level
- 8) Involve EE in process of job description. Collaborative. Buy-in.
- 9) Box to check for annual or initial 6 month (or periodic)
- 10) Initial description of the goal of the evaluation tied into job description.
- 11) Training at January management meeting
- 12) Five types

Executive (COO, CFO, 3 Sr Directors)

Directors (Mgmt Team)

Coordinators and professionals

Clinical

Support Staff

13) Goals for upcoming year (include training needs)

HUMAN RESOURCES

A DELLOLIBULG DE LEMENT DE

It destroys morale, kills teamwork and hurts the bottom line. And that's just for starters.

By Samuel A. Culbert

ou can call. ME "dense,"
you can call ne "iconoclastic," but I see nothing constructive about an annual
pay and performance review. It's a mainstream practice that
has baffled me for years.

To my way of thinking, a one-side-accountable, boss-administered review is little more than a dysfunctional pretense. It's a negative to corporate performance, an obstacle to straight-

Failing Grade

- * The Promise: Performance reviews are supposed to provide an objective evaluation that helps determine pay and let's employees know where they can do better.
- * The Problems: That's not most people's experience with performance reviews. Inevitably reviews are political and subjective, and create schisms. In boss-employee relationships. The link between pay and performance is tenuous at best. And the notion of objectivity is absurd; people who switch jobs often get much different evaluations from their new bosses.

* The Solution. Performance previews instead of reviews. In contrast to one-side-accountable reviews, performance previews, performance previews, are reciprocally accountable discussions about how boss and employee are going to work together even more effectively than they did in the past. Previews weld fates together. The boss's skin is now in the game.

talk relationships, and a prime cause of low morale at work. Even the mere knowledge that such an event will take place damages daily communications and teamwork.

The alleged primary purpose of performance reviews is to enlighten subordinates about what they should be doing better or differently. But I see the primary purpose quite differently. I see it as intimidation aimed at preserving the boss's authority and power advantage. Such intimidation is unnecessary, though: The boss has the power with or without the performance review.

And yes, I have an alternative in mind that will get people and corporations a great deal more of what they actually need.

To make my case, I offer seven reasons why I find performance reviews illadvised and bogus.

TWO PEOPLE, TWO MIND-SETS

pants in a performance review work at Let's start with an obvious reason: cuss where performance needs to be The mind-sets held by the two particicross-purposes. The boss wants to disimproved, while the subordinate is focused on such small issues as compensation, job progression and career advancement. The boss is thinking about missed opportunities, skill limitations hancing, while the subordinate wants to put a best foot forward believing he or she is negotiating pay. All of this and relationships that could use enputs the participants at odds, talking past each other. At best, the discussion accomplishes nothing. More likely, it creates tensions that carry over to their everyday relationships.

Then there are second-order problems. A subordinate who objects to a characterization of faults runs the risk of adding another to the boss's list; "defensiveness and resistance to critique." And the boss who gets her mind turned around by a subordinate's convincing argument runs the risk of having a bigger bost think she failed to hold the line on what had been decided and budgeted. Good luck to her when she next gets evaluated.

PERFORMANCE DOESN'T DETERMINE PAY

Another bogus element is the idea that pay is a function of performance, and that the words being spoken in a performance review will affect pay. But usually they don't. I believe pay is primarily determined by market forces, with most jobs placed in a pay range prior to an employee's hiring.

Raises are then determined by the boss, and the boss's boss, largely as a result of the marketplace or the budget. The performance review is simply the place where the boss comes up with a story to justify the predetermined pay. If the raise is lower than the subordinate expects, the boss has to say, "We can work to get it higher in the future, and here are the things you need to do to get to that level." Or the boss can say, "I think you walk on water, but I got push-back from H.R. and

next year we'll try again."
Inother words, too many lines spoken in a performance review are a cover story for the truth and have little to do with performance. Even when it's a positive review, the words spoken are likely to be aimed more at

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winning the subordinate's gratitude than at providing a candidly accurate description.

OBJECTIVITY IS SUBJECTIVE

Most performance reviews are staged as "objective" commentary, as if any two supervisors would reach the same conclusions about the merits and faults of the subordinate. But consider the well-observed fact that when people switch bosses, they often receive sharply different evaluations from the new bosses to whom they now report.

To me, this is just further proof that claiming an evaluation can be "objective" is preposterous, as if any assessment is independent of that evaluator's motives in the moment. Missing are answers to questions like, "As seen by whom?" and "Spun for what?" Implying that an evaluation is objective disregards what everyone knows: Where you stand determines what you see.

The absurdity is even more obvious when bosses—as they so often do pase their reviews on anonymous eedback received from others. This ilogic is highlighted in the contempoary performance-reviewing fad alled "360-degree feedback." Hate nail, I suppose, is similarly "objecive." People are told, "I can't tell you vho said this," as if the alleged trutheller has no ax to grind and the allegaion is unrelated to a specific motive r a disagreement in a relationship. lome on! Isn't "anonymous" just a licker way for people to push what's n their political interests to estabish, without having their biases and notives questioned?

What will it take for people to relly understand that any critique is as such an expression of the evaluator's elf-interests as it is a subordinate's attibutes or imperfections? To my way f thinking, the closest one can get to objective" feedback is making an evalator's personal preferences, emonal biases, personal agendas and sitational motives for giving feedback ifficiently explicit, so that recipients and determine what to take to heart or themselves.

ONE SIZE DOES NOT FIT ALL

Employees all come with their own characteristics, strong suits and imperfections that they orchestrate in every attempt to perform their best. Because no two people come similarly equipped, they draw upon the unique pluses and minuses they were endowed with at birth along with compensatory assets they subsequently developed.

And yet in a performance review, employees are supposed to be measured along some predetermined checklist. In almost every instance what's being "measured" has less to do with what an individual was focusing on in attempting to perform competently and more to do with a checklist expert's assumptions about what competent people do. This is why pleasing the boss so often becomes more important than doing a good job. Create a positive impression and the boss will score you high on any dimension presented.

Worse bosses apply the same rating scale to people with different functions. They don't redo the checklist for every different activity. As a result, bosses reduce their global sentiments to a set of metrics that captures the unique qualities of neither the person nor the job.

Maybe, for instance, there's a guy who doesn't voice his viewpoint when he disagrees with something said. Does that mean he should be graded down for being a conflict-avoider—as if the boss's in-your-face way of communicating is superior? He may be seen as doing a bad job based solely on an incompatibility of styles that may have little to do with actual performance.

PERSONAL DEVELOPMENT IS IMPEDED

The drive for improvement goes on in big and little ways at work. You would think that the person in the best position to help somebody improve would be his or her boss.

Yet, thanks to the performance review, the boss is often the last person an employee would turn to.

Why is that?

The No. 1 reason for that reluctance is that employees want to turn to somebody who understands their distinctive talents and way of thinking, or knows them sufficiently well to appreciate the reasons behind the

unique ways they are driven to operate. By contrast, people resist help from those who they believe can't get them in proper focus, especially when they have tried on many occasions to tell them.

What's more, people don't want to pay a high price for acknowledging their need for improvement—which is exactly what they would do if they arm the boss with the kind of personal information he or she would need to help them develop. It could all come back to haunt them in the performance review. No wonder the developmental discussions the boss wants to inject at the time of a performance review so often get catego-

rized by subordinates as gun-to-thehead intimidation requiring false acquiescence, lip-service agreement and insincere, appearance-correcting actions.

DISRUPTION TO TEAMWORK

Managers can talk until they are blue in the face about the importance of positive team play at every level of the organization, but the team play that's most critical to ensuring that an organization runs effectively is the one-on-one relationship between a boss and each of his or her subordinates.

The performance review undermines that relationship.

That's because the performance review is so one-sided, giving the boss all the power. The boss in the performance review thinks of himself or herself as the evaluator, and doesn't engage in teamwork with the subordinate. It isn't, "How are we going to work together as a team?" It's, "How are you performing for me?" It's not our joint performance that's at issue. It's the employee's performance that's a problem.

All of which leads to inauthentic behavior, daily deception and a ubiquitous need for subordinates to spin all facts and viewpoints in directions they believe the boss will find pleasing. It defeats any chance that the boss will hear what subordinates actually think.

Here's a simple example: In a performance review, the boss cites a subordinate's missing a high-profile meeting as cause for a reduced rating. What if the reason was something personal—perhaps a son picked up by the police—that the employee doesn't want to reveal? Why not reveal it? Because oneway accountability inevitably creates distrust. Does the boss self-reflect and ask, "What did I do, or should I be doing, to build up the trust?" No, the boss

faults the guy for secretiveness. It's a vicious cycle.

IMMORALITY OF JUSTIFYING CORPORATE IMPROVEMENT

I believe it's immoral to maintain the facade that annual pay and performance reviews lead to corporate improvement, when it's clear they lead to more bogus activities than valid ones. Instead of energizing individuals, they are dispiriting and create cynicism. Instead of stimulating corporate effectiveness, they lead to just-incase and cover-your-behind activities that reduce the amount of time that

could be put to productive use. Instead of promoting directness, honesty and candor, they stimulate inauthentic conversations in which people cast self-interested pursuits as essential company activities.

The net result is a resource violation, and I think citations should be issued. If it's a publicly held company, shareholder value gets decreased. If it's a governmental organization, time is lost that could be spent in pursuit of the public good. And what participants learn in the process has more to do with how to survive than with meaningful self-development.

T've often thought that every organization should be considered partially a public entity since they exist, in part, to provide meaningful activities for the people who work in them. Skills and mind-sets acquired at work go home with people to affect family, community, culture and even the world. The more positive an atmosphere we can create at work, the more positive an impact it has at home. In short, what goes around comes around.

SO, WHAT'S THE ALTERNATIVE?

The alternative to one-side-accountable, boss-administered/subordinate-received performance *reviews* is two-side, reciprocally accountable, performance *previews*.

Let me explain.

The boss's assignment is to guide, coach, tutor, provide oversight and generally do whatever is required to assist a subordinate to perform successfully. That's why I claim that the boss-direct report team should be held jointly accountable for the quality of work the subordinate performs. I'm sick and ired of hearing about subordinates who fail and get fired, while bosses, whose job it was to ensure subordinate

effectiveness, get promoted and receive raises in pay.

Holding performance previews eliminates the need for the boss to spout self-serving interpretations about what already has taken place and can't be fixed. Previews are problem-solving, not problem-creating, discussions about how we, as teammates, are going to work together even more effectively and efficiently than we've done in the past. They feature descriptive conversations about how each person is inclined to operate, using past events for illustrative purposes, and how we worked well or did not work well individually and together.

The preview structure keeps the focus on the future and what "I" need from you as "teammate and partner" in getting accomplished what we both want to see happen. It doesn't happen only annually, it takes place each time either the boss or the subordinate has the feeling that they aren't working well together.

Realistic assessment of someone's positive qualities requires replacing scores on standardized checklists with inquiry. As a result, step No. 1 in giving effective feedback almost always involves "active questioning" inquiry. Inquiry contrasts with most performance reviews, which begin with how the evaluator sees the individual and what that boss has already decided most needs enhancing. Both participants need an answer to the most significant issue at hand: "Given who I am and what I'm learning about this other individual, what's the best way for us to complement one another in getting work accomplished with excellence?" If in the process the other person decides to change and develop, so much the better.

Bosses should be asking all the questions that occur to them in inquiring about how a subordinate thinks he or she can best perform the job. Then, after they have exhausted their questions, they should ask the subordinate for what else they need to know. At a minimum, they should be asking "How will you be going about it?" and "Specifically, what help do you need from me?" Why not get it all when, at the end of the day, the boss still has the authority to play ultimate decider?

Some of you may also ask if the performance review goes away, how do we prepare the groundwork if we want to fire somebody? For the better, I'd argue: Take away the performance review, and people will find more direct ways of accomplishing that task.

Substituting performance previews for performance reviews promotes straight-talk relationships for people who are up to it. It welds fates together because the discussion will be about what the boss-subordinate team accomplishes together, which I believe is the valid unit to hold accountable. It's the boss's responsibility to find a way to work well with an imperfect individual, not to convince the individual there are critical flaws that need immediate correcting, which is all but guaranteed to lead to unproductive game playing and politically inspired back-stabbing.

There are many bosses who would like to change that game, but they feel handcuffed by the rules already in play. I'd like to believe that if given the chance, they would embrace a system that allows them just as much authority—but in a way that promotes trust, not intimidation.

Keep in mind, of course, that improvement is each individual's own responsibility. You can only make yourself better. The best you can do for others is to develop a trusting relationship where they can ask for feedback and help when they see the need and feel sufficiently valued to take it. Getting rid of the performance review is a necessary, and affirming, step in that direction.

WSJ.com

JOURNAL VIDEO: How should a manager deal with a poorly performing employee to get better results? Samuel Culbert offers his views, in a conversation with the Journal's Erin White. You can see the video at WSJ.com/BusinessInsight.

JOURNAL PODCAST: How should an employee deal with a negative performance review, both during and after the meeting? Samuel Culbert talks with Erin White, at WSJ.com/BusinessInsight.

JOIN THE DISCUSSION: Do you agree that performance reviews do more harm than good? What effects have you seen in your company? What would you suggest that reviews be replaced with? Share your thoughts in an online forum with Samuel Culbert, at WSJ.com/BusinessInsight



USD Evaluation Consulting Meeting November 12, 2008

Present: Brenda Bothel, Karen Gould, Dorothy O'Hagan, Guin Kerstetter, Alan Zamosky, Helene Sherman, Debra Stern-Ellis, Sheri Kirshenbaum

USD Consultants presented a Powerpoint presentation and 3 different evaluation templates.

COMMENTS/DECISIONS REGARDING EVALUATION FORMAT:

- Chose template #1
- Name: Employee Development Plan
- Ratings: Exceeds Expectations, Meets Expectations, Improvement Needed
- One format for all employee types (clinical, professional, supervisory, etc)
- Include an "editable" box to indicate skills specific to the role
- Include organizational evaluation and department/director evaluation
- JFS leadership team needs to review in detail the text to make any edits

TIMELINE:

- Timeline moved up vs. what was in our presentation because client sees very little changes needed. New timeline is...
- Nov. 17 -- JFS sends consolidated changes to consultants
- Nov. 21 -- consultants + JFS leadership team meets to review final document and presentation for December 2nd management team meeting
- Nov. 24 -- consultants send JFS leadership team final document incorporating any changes from the Nov. 21 meeting

NEXT STEPS:

- Brenda e-mail EDP format to JFS leadership
- JFS leadership internal meeting to consolidate comments
- Consultants incorporate comments into final document to be reviewed at Nov. 24 meeting
- Consultants meet Nov. 16 to put together December 2nd meeting presentation for Nov. 24 meeting
- Karen put final EDP format into Excel once approved at Nov. 24 meeting



Employee Evaluation Project

Presented by:
Brenda Bothel, Karen Gould,
and Dorothy O'Hagan
November 12, 2008

Background



- Employees at Jewish Family Service have not had a performance evaluation in two years
- Employee Performance Evaluations are not tied to annual merit increases
- Previous evaluation templates do not meet the needs of Jewish Family Service

October 20th Meeting Notes



- Evaluation is a staff development tool
- Identify employee strengths and weaknesses
- Create a living document
- A self evaluation needs to be completed by the employee prior to the review
- Include Measurable Objectives
- Remove numbers and scoring methodology
- User-friendly for Leadership team
 - Not too long or cumbersome
 - Manageable process

Objectives for Today's Meeting



- Review and choose template(s)
- Choose a name for the performance evaluation
- Choose a rating structure
- Employee Self Evaluation
- Review timeline
- Schedule follow up meeting with consultants

Things to Consider



- · Annual Review of all staff
- Interactive process including employee self review and opportunity for open comments by employee
- Three Components of industry standard:
 - Review of the employee
 - Employee's review of the organization
 - Employee's review of the CEO/Executive Director
- An annual opportunity to review and revise current job description with employee
- Growth or learning plan established for the year
- Involve staff in designing, delivering, and assessing their work.

More things to Consider



- Check-off boxes proven to be more effective
- Employee receives a copy of the review at least one day in advance of meeting
- Goals set at beginning of program year
- Industry recommendations: If a performance evaluation, any merit or pay increase should be awarded in accordance with performance
- · Leadership Training

Naming the Document



Consider removing the term "evaluation" from the document. This is a living document that does not directly tie into employee merit increases.

Possible Names



- Performance Preview
- Employee Performance Report
- Employee Action Plan
- Employee Performance Appraisal
- Employee Development Tool
- Employee Growth Plan
- Employee Development Plan

Templates



- Ratings with Goals— Template I
- Linked with Job Description
 - Template II
- Objectives Based Template III



Please hold questions until we have presented all three models

Template I - Brenda Bothel



Template Components

- Job Success Factors
- Goals from previous year
- Goals for coming year
- Professional Development Plan
- Quarterly Review

Key Characteristics

- Three formats
- Administrative
- Professional
- Management
- Supervisory Tool
- Includes measurable objectives from Job Description

Template II – Karen Gould



Template Components

- Objectives from prior year based on Job Description
- Objectives for new year
- Evaluation of Skills
- Quarterly Reviews

Key Characteristics

- One format for all
- Five skills allows tailoring for different jobs
- Skills linked to Job Description
- Objectives based on Job Description
- Self Evaluation on same form

Templa	ate III –
Dorothy	O'Hagar



Template Components

- Objective based evaluation
- Action Plan
- Mid-year checkup
- One form for all

Key Characteristics

- No grading
- Focuses only on development
- Goals may or may not relate to Job Description



Open Discussion

Rating System

- Limit the scale three categories
- Do not use a "score" since this does not tie to a merit

Exceeds Expectations
Meets Expectations
Needs Improvement

Other Suggested	С
Ratings	



High Performer:

Outstanding

- Exceptional
- Exceeds the Standard

Average Performer:

- Satisfactory
- Proficient
- Meets the Standard

Low Performer:

- Unsatisfactory
- Needs Improvement
- Below the Standard

Employee Self-Review



- Helps engage employee
- A help to Supervisor when completing the Development Plan
- Need to choose Template
- Incorporate Organizational Review
- Timeline for Employee Completion
- Comments and/or concerns

Next Steps



- November 19 Consultants will email working draft of employee performance template(s) including key message points for Manager's Meeting scheduled for December 2nd.
- November 26 Representative from JFS Leadership team to email working draft(s) and key talking points back to consultants with consolidated comments

Next Steps (continued)



- December 2 Brenda and Helene to present key points of new process at JFS Management Meeting
- Week of December 8th Meeting to go over final product



"Don't do annual reviews if that's all the time spent on performance management.

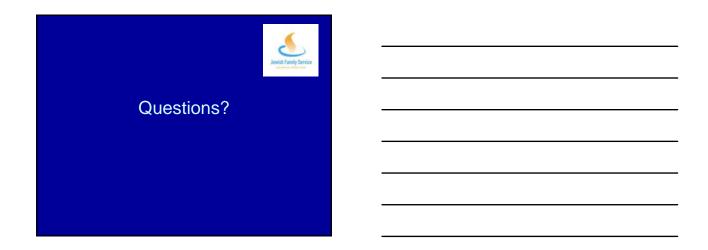
Performance management is about ongoing performance conversations

That's the only way to support improvement." Career Builder.

Contact Information



- Brenda Bothel <u>brendab@jfssd.org</u> (619) 220-0268
- Dorothy O'Hagan <u>dohagan@rchsd.org</u> (858) 560-6009
- Karen Gould
 karengould@yahoo.com
 (619) 977-1974



Employee:	Job Title:	
Department:	Review Period:	
		Jewish Family Service
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Employee Development Plan

Instructions:

Effective supervision of job performance is an on-going process. Annually each manager or supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used annually to set up a development plan and quarterly during the year to check in with progress.

Part I – Job Success Factors

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above.

Part II - Goals from last year or last evaluation period

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Goals for this coming year or evaluation period

Enter the performance goals for the next period to be reviewed. Individual goals and objectives should align with those of the job description and professional growth.

Part IV - Professional Development Plan

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III. above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

Part V - Quarterly Review

Review employee development plan quarterly. Note progress and any agreed upon changes.

Rating Scale*:

EE **Exceeds expectations**

Performance consistently exceeded expectations in all essential areas of responsibility,

and the quality of work overall was excellent. Annual goals were met.

ΜE Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

IN improvement needed

Performance did not consistently meet expectations - performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section IV, including timelines, and monitored to measure progress.

^{*}The inclusion of goals is typically a consideration in assessing the overall rating.

Employee:	Job Title:
Department:	Review Period:

Part I. Job Success Factors

Factors Rating

Rating (Check Box)

Comments

		OK DC	'^/	y * '- '
NON EXEMPT EMPLOYEE COMPETENCIES	EE	ME	IN	
1. Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others				
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2. Stewardship Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines				
2 Problem colving	 	†		
3. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges				
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4. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions				
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5. Planning and organizing Achieves agency assignments within timelines and resources; scopes, plans and schedules work; sets priorities and goals; anticipates and adjust for problems; evaluates workloads; measures and evaluates performance against goals				
6. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively				
7. Quality improvement				
Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements				
8. Leadership		1	 	
Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others				
9. Teamwork	1	1		
Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible				
10. Service focus				
Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided				
		1		

Part II. Last Perio				a maniard and any many a sele	
Rate the progress made on each of the goals established at the beginning of the period and any new goals. Note any modifications to the original goals.					
Goal	Ra	ting		Comments	
	EE	ME	IN		
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Part III. Next Period's Goals Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those in the job description and areas of professional growth.					
1. Measure of success:					
2.					
Measure of success: 3.					
Measure of success:					
4.					
Measure of success:					
5.					

 Employee:________ Job Title:_______

 Department:_______ Review Period:________

Progress toward meeting these goals will be reviewed quarterly.

Measure of success:

	loyee: Job Title: artment: Review Period:
_ 0,00	
	Part IV. Professional Development Plan
	Part V. Quarterly Review
Meet	quarterly with employee and review progress towards job success factors, goals, and professional
	lopment plan. Note the date of meeting and discussion points in area provided. If additional area is ed, attach another page.
t	
d	
d [
Sian	natures:
<u>oigi</u>	Employee: Date:
	My signature indicates that I have received a copy of this plan. I would like to include comments from my personal review.
	Manager/supervisor: Name: Signature: Date:
	Senior Director: Name:

The employee is to receive a copy of the completed development plan and one copy shall be placed in the personnel file.

Employee:	Job 1	Title:	AC 180
Department:	Revie	ew Period:	
			lowich Fami

Non Exempt Personal Review

Part I. Job success factors:

Preparation of the employee development plan is an interactive process where there is an exchange of information between you and your supervisor. Please provide your supervisor with information related to your performance in any of the job success factors noted below.

	Comments
1. Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others	
Stewardship Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines	
Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges	
Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions	
5. Planning and organizing Achieves agency assignments within timelines and resources; scopes, plans and schedules work; sets priorities and goals; anticipates and adjust for problems; evaluates workloads; measures and evaluates performance against goals	
6. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively	
7. Quality improvement Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements	
8. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others	
9. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible	
10. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided	

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	Departmen	it:	Review Period:		
	Part II. Go Provide an review perio Goal	assessment of your success in reaching	success in reaching the goals set at the beginning of the last		
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			to consider. Include training and other to achieving these goals and important to		
	Wh	nployee Feedback (Optional) nat changes in the natures of your po ade to improve your effectiveness?	sition and/or work environment could be		
	• Lis	t any personal and/or professional ac	ccomplishments you would like to share:		
	• Wh	nat suggestions do you have in regard	d to Jewish Family Service as a whole?		
	Comments List any top review.		vish to discuss with your supervisor during your		
	Signature: Em	nployee:	Date:		
	De	_ Check here if you would like this Work velopment Plan and your personnel file.			

Employee: Department:	 Job Title: Review Period:	
		Jewish Family Service
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Employee Development Plan

Instructions:

Effective supervision of job performance is an on-going process. Annually each manager or supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used annually to set up a development plan and quarterly during the year to check in with progress.

Part I - Job Success Factors

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above.

Part II - Goals from last year or last evaluation period

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Goals for this coming year or evaluation period

Enter the performance goals for the next period to be reviewed. Individual goals and objectives should align with those of the job description and professional growth.

Part IV - Professional Development Plan

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

Part V - Quarterly Review

Review employee development plan quarterly. Note progress and any agreed upon changes.

Rating Scale*:

EE Exceeds expectations

Performance consistently exceeded expectations in all essential areas of responsibility, and the guality of work guarant was excellent. Appeal goals were mot

and the quality of work overall was excellent. Annual goals were met.

ME Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

IN Improvement needed

Performance did not *consistently* meet expectations – performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section IV, including timelines, and monitored to measure progress.

*The inclusion of goals is typically a consideration in assessing the overall rating.

Employee:	Job Title:
Department:	Review Period:

Part I. Job Success Factors Rating (Check Box)

Factors

Comments

	(Check Box)			
EXEMPT EMPLOYEE COMPETENCIES	EE	ME	IN	
Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others				
2. Managing people Coaches, evaluates, develops, inspires people; sets expectations, recognizes achievements, manages conflict, aligns performance goals with agency goals, provides feedback, group leadership; delegates				
3. Stewardship and managing resources Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines				
4. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges				
Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions				
6. Strategic planning and organizing Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to redirect as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; can see connections within complex issues				
7. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively				
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9. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others			:	
10. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible				
11. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided				

Goal	Ra	iting		Comments
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Enter the performance goals for the next period with those in the job description and areas of process: Measure of success: Measure of success: Measure of success: Measure of success:	d to be evaluated. Ir			s and objectives should align
Enter the performance goals for the next period	d to be evaluated. Ir			s and objectives should align

Job Title:_____ Review Period:_

Employee:___ Department:_

Progress toward meeting these goals will be reviewed quarterly.

Emp Dep	bloyee: Job Title: artment: Review Period:
	Part IV. Professional Development Plan
	Part IV. Professional Development Plan
Moo	Part V. Quarterly Review t quarterly with employee and review progress towards job success factors, goals, and professional
deve	reliable to the date of meeting and discussion points in area provided. If additional area is
	ded, attach another page.
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ord	
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<u>Sigr</u>	natures:
	Employee: Date:
	My signature indicates that I have received a copy of this plan. I would like to include comments from my personal review.
	Managaria una minaru Nama:
	Manager/supervisor: Name: Date: Date:
	Senior Director: Name:
	Naporuro:

The employee is to receive a copy of the completed development plan and one copy shall be placed in the personnel file.

Employee:	Job Title:	
Department:	Review Period:	
	Exempt Personal Review	Jewish Family Servic

Part I. Job success factors:

Preparation of the employee development plan is an interactive process where there is an exchange of information between you and your supervisor. Please provide your supervisor with information related to your performance in any of the job success factors noted below.

	Comments
Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others	
2. Managing people Coaches, evaluates, develops, inspires people; sets expectations, recognizes achievements, manages conflict, aligns performance goals with agency goals, provides feedback, group leadership; delegates	
3. Stewardship and managing resources Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, appropriate understanding of confidentiality, agency values and mission; adheres to policies, procedures, and safety guidelines	
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7. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively	
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11. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided	

	Employ		
	Departr	ment:	Review Period:
			reaching the goals set at the beginning of the last
	Guai		Comment
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	Describ develor		d development plan pervisor to consider. Include training and other relevant to achieving these goals and important to
	Part V. ●	Employee Feedback (Optional) What changes in the natures of made to improve your effectiver	your position and/or work environment could be ness?
	•	List any personal and/or profess	sional accomplishments you would like to share:
	•	What suggestions do you have i	in regard to Jewish Family Service as a whole?
	Comm List any review.	y topics, issues, or problem areas th	nat you wish to discuss with your supervisor during your
	Signatu	<u>ıre:</u> Employee:	Date:
		Check here if you would like the Development Plan and your perso	his Worksheet to be included in your Employee nnel file.



CEO/ Organization Review

CONFIDENTIAL

Please do not put your name on this form. This form is to be returned to the board chair by placing it in their mailbox at Turk Family Center.

Rating Scale:

EE Exceeds expectations

Performance consistently exceeded expectations in all essential areas of responsibility,

and the quality of work overall was excellent. Annual goals were met.

ME Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The

most critical annual goals were met.

IN Improvement needed

Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section IV, including timelines, and monitored to

measure progress.

Factors				Comments
	(Check Box)			
CEO COMPETENCIES	EE	ME	IN	
Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others				
Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions				
3. Strategic planning and organizing Strives towards the big picture and aligns priorities with broader goals, measures outcomes, uses feedback to redirect as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; can see connections within complex issues				
4. Communication Connects with subordinates, donors and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively				
5. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others				
6. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible				

EMPLOYEE DEVELOPMENT PROGRAM Jewish Family Service NAME: DEPT: TITLE: **REVIEW PERIOD:** OBJECTIVE 1: **KPI** SURPASSED MET **BELOW** INDICATOR EXPECTATION EXPECTATION EXPECTATION RESULT **KPI'S AND RESULT ACTIVITIES REALIZED:** 2 3 COMMENTS: SURPASSED MET **BELOW** EXPECTATION EXPECTATION SELF-EVALUATION RANKING: OBJECTIVE 2:[KPI SURPASSED MET **BELOW INDICATOR** RESULT EXPECTATION EXPECTATION **KPI'S AND RESULT ACTIVITIES REALIZED:** 2 COMMENTS: **SURPASSED** MET BELOW **EXPECTATION EXPECTATION EXPECTATION** SELF-EVALUATION RANKING: **OBJECTIVE 3:** KPI RESULT SURPASSED **BELOW** MET **KPI'S AND RESULT**

ACTIVITIES REALIZED:

2

3 4 COMMENTS:

SURPASSED MET BELOW

SELF-EVALUATION RANKING:

EXPECTATION EXPECTATION

EMPLOYEE DEVELOPMENT PROGRAM

SKILLS FOR REACHING EMPLOYEE'S OBJECTIVES

From the list of skills, indicate the five which are most important for the employee's success in accomplishing their objectives. Provide comments on their strengths and opportunities.

	CESS			
Skill	Exceeds Expectations	Meets Expectations	Below Exceptations	Comments
1				
2				
3	<u> </u>			
4				
5				

SKILLS DESCRIPTIONS

Information Organization — Ability to store and retrieve information through the use of computer and through manual filing systems.

Quality and accuracy of work — Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well

Inclusiveness – Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy

Creativity - Suggests new ideas and solutions for improvement.

Professionalism — Consistently exhibits positive and professional behavior towards co-workers, vendors and clients. Demonstrates a willingness and ability to cooperate and work with others.

Teamwork -- Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible.

Communication — Ability to express self in a clear, concise and easily understood manner verbally and in writing. Actively listens, clearly and effectively shares information.

Leadership -- Provides guidance and direction, motivates others. Demonstrates political acumen; develops trust and credibility; expects honest and ethical behavior of self and others.

Management Skills — Employee can effectively plan, coordinate and oversee projects or programs. Coaches, evaluates, develops, inspires people; manages conflict, provides feedback; delegates

Initiative -- Seeks ways to improve programs, anticipate problems and seek solutions.

Compliance — Meets budgets and regulatory mandates from funding agencies. Is familir with and follows policies and regulations.

Quantity/Productivity -- Ability to carry out expected volume in a timely manner.

Stewardship — Demonstrates accountability and sound judgment in managing resources in open and effective manner, appropriate understanding of agency values and mission

Decision Making — Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions

Responsibility - Is accountable for actions and mistakes.

Service Focus - Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus

Strategic Planning and Organization -- Understands the big picture and aligns priorities with broader goals, measures outcomes, uses feedback, evaluates alternatives

Managing Resources — Demonstrates accountability and sound judgment in managing agency resources in open and effective manner, adheres to policies and procedures

Problem Solving -- Recognizes problems or potential problems in a timely manner, and responds quickly to new challenges.
Conducts analyses, searches for best solutions

Planning and Organizing -- Achieves asignments within timelines and resources; scopes, plans and schedules work; sets priorities and goals; measures and evaluates performance

Adaptability — Is able to adapt to new or different requirements and/or interruptions.

Community Relations — Effectively interacts with community liaisons and committee members.

SKILLS SELF-EVALUATION

From the list of skills, indicate the five which are most important for the employee's success in accomplishing their objectives. Provide comments on their strengths and opportunities related with the indicated skills

their strengths and opportunities related with the indicated skills.						
	KEY COMPET	ENCIES FOR E	CESS			
·	Exceeds	Meets	Below			
Skill	Expectations	Expectations	Exceptations	Comments		
1						
2						
3						
4						
5						

NEXT PERIOD'S GOALS

Enter the performance g align wit	oals for the	e next period to be the job description	e evaluated. Indivi on and areas of pro	idual goals an fessional grow	d objectives should th.
OBJECTIVE 1: KPIs:					
OBJECTIVE 2: KPIs:					
OBJECTIVE 3: KPIs:					
Objective: Inform of actions, if necessary		FIRST QUA toward objectiv	RTER REVIEW es on a quarterly	basis. Estab	lish corrective
SUPERVISOR	COMMEN	TS (STRENGTH	IS, OPPORTUNITII	ES FOR IMPR	ROVEMENT,
EMPLOYEE SELF	-COMMEN	ITS (COMMITME	ENTS. AGREEMEN	ITS. DEVELO	PMENT IDEAS)
EMPLOYEE SIGNATI	ÜRE	SUPERVISO	R SIGNATURE		DATE
		SECOND OIL	ARTER REVIEW		
Objective: Inform of actions, if necessary				basis. Estab	lish corrective
SUPERVISOR	COMMEN	TS (STRENGTH	S. OPPORTUNITII	ES FOR IMPR	OVEMENT.
EMPLOYEE SELF	-COMMEN	ITS (COMMITME	NTS. AGREEMEN	ITS. DEVELO	PMENT IDEAS)
EMPLOYEE SIGNATU	JRE	SUPERVISOR	R SIGNATURE		DATE
Objective: Inform of actions, if necessary			RTER REVIEW es on a quarterly I	oasis. Establ	ish corrective
SUPERVISOR	COMMEN	TS (STRENGTH	S. OPPORTUNITIE	S FOR IMPR	OVEMENT.
EMPLOYEE SELF-	-COMMEN	TS (COMMITME	NTS. AGREEMEN	TS. DEVELO	PMENT IDEAS)
EMPLOYEE SIGNATU	JRE	SUPERVISOR	R SIGNATURE	Million estimate de l'escretaire de l'escretai	DATE



EMPLOYEE DEVELOPMENT PLAN

Department:	Year:	2008 -	2009
Employee:	- conduits and a second conduction of the seco		State this management about to
Position:	X		<u> Airin ahan airin airin a</u>
Leader:	antithal and demonstrate new dates necessary	nen sem ne men men militad servid i hali tir hida debili militad beli militad servici del deservici del deserv	

Development Plan Process

Your Leader will forward you a copy of a self-review form. Take the time to review and consider the questions as they relate to your role. Return the completed self-review to your leader within one week's time. You and your leader will then meet to review your job description, job performance, accomplishment of objectives, and job development plan. You will develop new objectives for the coming year. The review includes a narrative that summarizes your achievements and/or specifies necessary improvements and will include some of your own comments.

Job Description

The job description describes the essential functions of your position. Review the job description with your leader and revise if necessary. Discuss performance in relation to the job description. Attach a copy of the job description to the packet.

Objectives

Objectives are measurable outcomes with a timeframe that you will accomplish in the context of your job over the next year. The previous year's objectives are reviewed at the leader/employee development plan meeting and new objectives are developed. At least one objective should reflect a new achievement. List objectives and action steps that will help achieve the stated objective.

Job Development Plan

Each employee must have a job development plan which outlines activities for your personal and professional growth. The plan may include such things as classes or workshops you will attend, agency in-services, or individual inquiry and research.

All development plans must be signed and dated by employee and leader. The leader will submit a complete packet to Human Resources.

EMPLOYEE DEVELOPMENT PLAN: Objectives and Action Plan	1
Performance and Professional Development Planning Form. Set no more than 4 objective nust include the Job Development Plan.	tives, but no less
OBJECTIVE #1	785-79
Action Steps:	Time Frame
1.	
2.	
3.	
Leader Comments: Mid year review date	
Leader Comments: Yearend review date	
Objective Md	
Objective #1 Attained Partially Attained Not Attained	
OBJECTIVE #2	
Action Steps:	Time Frame
1.	
2.	
3.	
Leader Comments: Mid year review date	
Leader Comments: Yearend review date	
Objective #2 Attained Partially Attained Not Attained	

Date_

Employee Name_

EM	PLOYEE DEVELOPMENT PLAN: (Objectives and Action Plan	
OBJ	ECTIVE #3		
Actio	n Steps:		Time Frame
1.			
2.			
3.			
Lead	er Comments:	Mid year review date	
Lead	er Comments :	Yearend review date	
Obje	ctive #3 Attained Partially Attained	Not Attained	
OBJE	ECTIVE #4		
Actio	n Steps:		Time Frame
1.			
2.			·
3.			i
Lead	er Comments:	Mid year review date	33.74.5
Lead	er Comments:	Yearend review date	
Objec	tive #4 Attained Partially Attained	Not Attained	

Employee Name____

Date____

Employee Name	Date
EMPLOYEE DEVELOPMENT PLAN: Job D	Development Plan
Professional Associations you belong to:	
Professional Training and Development Activin-service, and/or research you hope to comp	
Training Completed:	

Employee Name	Date
EMPLOYEE DEVELOPMENT PLAN:	Narrative and Signatures
Leadership Narrative:	
-	
Employee Comments:	
The leader and employee have reviewed at the current period:	nd discussed the employee development plan for
Employee:	Date:
l eader	Date:



USD Evaluation Consulting Meeting November 17, 2008

Present: Brenda Bothel, Guin Kerstetter, Alan Zamosky, Helene Sherman, Debra Stern-Ellis

JFS employees had reviewed the Employee Development Plan document prior to the meeting and came prepared with their comments. This meeting was set up as an JFS employee meeting, only.

JFS EDITS:

- Consolidate the Employee Development Plan into 1 form for the entire agency
- Consolidate the Employee Personal Review into 1 form for the entire agency
- The "Exempt" Employee Development Plan & Personal Review used as the model Minor verbiage changes to the Job Success Factors
- Changed the Employee Development plan from a quarterly check-in review to 6-month check in
- Agency decided not to utilize an Organization Review, Director, or a CEO Review
- As a future enhancement, an Organization Review and/or Director Review may be added Under "Employee Feedback" on the Employee Personal Review
- JFS requested to remove "work environment" from question
- Removed the option of giving the employee the ability to indicate if they want the document in their personnel file:
- "Check here if you would like this Worksheet to be included in your Employee Development Plan and your personnel file."



Employee Development Process

Training Material and final document for JFS Management Meeting

Presented by: Brenda Bothel, Dorothy O'Hagan, and Karen Gould November 21, 2008

JFS Mission



Strengthen the individual, enhance the family, protect the vulnerable, with human services based on Jewish values.

Process Objectives



- Create a living, evolving development tool
- Use to align supervisor and employee on goals, results and next steps
- Involve employees in designing, delivering and assessing their work
- Identify strengths and areas of opportunity
- Create a user-friendly document and process



Employee Development Plan (EDP)

Employee Development Plan



- What it is not:
 - This is not an evaluation
- What it is:
 - Structured feedback meetings between supervisor and employee
 - Opportunity to align on goals and projects
 - Discussion of strengths and training opportunities related to job skills
 - Identification of progress made and/or corrective actions that need to be taken

Key Elements of the Employee Development Plan



- Five components of the Development Plan
 - Job Success Factors
 - Last Period's Goals
 - Next Period's Goals
 - Continuing Education and/or Training
 - Progress Towards Goals
- Employee Personal Review
- New Rating System

Rating



- Rating system is not a "grade" or "score"
- Rating system summarizes whether or not employee is on track
 - Exceeds Expectations
 - Meets Expectations
 - Improvement Needed
- Ratings applied to goals and job skills

Exceeds Expectations



- Exceeds expectations in all essential areas of responsibility
- Quality of work overall was excellent
- Annual goals were met and exceeded

The employee consistently goes above and beyond in the skill or goal

Meets Expectations



- Consistently met expectations in all essential areas of responsibility
- At times exceeded expectations
- · Work overall was very good
- Most critical annual goals were met

The employee is doing a good job in the skill or goal

Needs Improvement



- Performance did not consistently meet expectations
- Failed to meet expectations in one or more essential areas of responsibility
- One or more of most critical goals were not met

Requires documentation with specific actions and timeline to monitor progress



Components of the Employee Development Plan

Part I: Job Success Factors



- 13 skills and basic competencies related to measurable objectives in job description
 - Rating: indicate with "x"
 - Comments: write strengths or opportunities
- If the Job Success Factor doesn't apply to employee, note "N/A" in Comments section
- Specific comments <u>must</u> be written for ratings of "Exceeds Expectations" or "Needs Improvement"

Part II: Last Period's Goals



- Rate progress made on previous goals
 - Rating: indicate with "x"
 - Comments: results, accomplishments, next steps, etc
- Supervisors need to ensure that employees know which goals will be reviewed
 - Measurable Objectives from job description
 - Goals established in last review
- Specific comments <u>must</u> be written for ratings of "Exceeds Expectations" or "Needs Improvement"

Part III: Next Period's Goals



- Identify goals for the next period
- Measurable goals from job description
 - Employee's professional growth goals
- Include measure of success
- Must be discussed and agreed upon with employee

Part IV: Continuing Education and/or Training



- Actions that will be taken by employee and/or supervisor to support:
 - Upcoming Goals identified in Part III
 - Job Success Factors identified in Part I
- May include career growth, job mastery or actions to correct performance

Part V: Progress Towards Goals



- What it is:
 - A six-month review of Employee Development
 Plan with employee to ensure on track
 - Note any progress or agreed upon changes
- What it is not:
 - A time to re-do entire Employee Development process, ratings, goal setting, etc.

Employee Personal Review



- Increases employee engagement
- A help to supervisor when completing the Development Plan
- An employee's time to "shine"
- Similar structure as Employee
 Development Plan but without ratings
- Open-ended questions for feedback about job and organization

Timeline



- December 3rd Begin meeting with teams to distribute Employee Personal Review
- On or before December 15th Employees turn in Personal Review to their supervisors

Timeline



- December 16th through January 14th:
 - Supervisors complete Employee
 Development Plans
 - Directors must review completed Plans with coordinators before their individual meetings
 - Directors/Coordinators schedule individual meetings with employees

Important Note



Provide the employee with the completed Employee Development Plan one day before the meeting.

Do not give out on a Friday.

Timeline



- January 15th Employee Development Plans need to be completed and signed by supervisor and employee
 - Provide employee with one copy
 - Keep a working copy for your file
 - Return original with Senior Director's signature to Human Resources



"Don't do annual reviews if that's all the time spent on performance management.

Performance management is about ongoing performance conversations

That's the only way to support improvement." Career Builder.



Questions?

JFS EVALUTION AND UPDATE CHECKLIST

- 1) Completed evaluation, signed by both supervisor and supervisee with attached job description. For all employees hired prior to 9-1-06.
- 2) Personnel Update 2007 for all employees.
- 3) Updated copy of Drivers License for all employees.
- 4) Updated copy of Car Insurance for all employees.
- 5) Updated copy of professional license for all staff of which this applies.
- 6) If desired, pre-designation of physician for Workers Compensation.

All these are due on March 31, 2007.

Managers - Please collect all forms, arrange by employee, and submit at one time to Lynn Bazan in Accounting 102 - E.

Dewish Family Service of San Diego Performance Evaluation – Management Team and Coordinators

Name			
Job Title			
Evaluation Period		·	

Purpose:

- To provide each employee with a clear understanding of job expectations
- To communicate honestly about performance that needs improvement and/or to recognize exceptional performance
- To listen to both employee and manager opinions about his/her performance
- To discuss goals for growth and development
- To provide both employee and manager with an ongoing tool to be used throughout the year

Instructions:

- First, the supervisor should review the job description with the employee.
- The supervisor should rate the employees performance during the past year or period being evaluated.
- If a question does not pertain to a particular employee, please enter N/A.
- Use your discretion as to which form will most likely match job duties. Some positions do not fit nicely into one category or another. Coordinators who manage volunteers should be evaluated using the Management/Coordinator form.
- The supervisor's completed form is to be signed and dated by both the manager and the employee and placed as a permanent document in the employee's personnel file. The review will be held in strict confidence.
- Please attach a copy of the job description to the evaluation.
- Please complete the annual evaluation by the end of March.

the organization. A superior rating.

AND PLEASE remember to use this evaluation as a tool throughout the year.

Rating Explanations:

- 5 = Exceeds all Expectations
 The staff member consistently excels in virtually all aspects of the job. The staff
 member demonstrates initiative by proposing new ventures, practices or
 procedures. The staff member is respected by colleagues and demonstrates a
 willingness to accept additional responsibilities not outlined in the job description.
 Performance is of a rare quality found only in a small percentage of people within
- 4 = Exceeds many Expectations and Meets all Expectations
 The staff member is competent and excels in all areas of the job and performs independently. The staff member shows initiative and commitment. Quality of work is clearly above average.

- 3 = Meets Expectations The staff member is competent in their work. They meet the standards of job performance for all aspects of the job. Performance is steady, reliable and is maintained with a minimum of supervision. Most employees fall into this category.
- 2 = Meets Some Expectations and Needs Improvement in Some Areas The staff member has demonstrated the ability to perform most basic job functions, but needs assistance in some areas. The staff member asks for assistance when appropriate, but needs additional training or experience to work on an independent basis. The staff member is committed to achieving the next level.
- 1 = Does Not Meet Expectations The staff member has not demonstrated the ability to perform the basic job responsibilities and does not perform on an independent basis. The staff member does not seek assistance when needed. The staff member has not demonstrated a willingness to improve. If improvement is not demonstrated within 3 months there may be grounds for termination.

Copy and Paste One 2006	Measured Goal fr	com the last version of t	he Job Description:
Has the goal been met?	Yes:	No:	Partially:
Comments (Progress):	103.	110.	Tarnary.
Comments (Flogress).			

Has the goal been met?	Yes:	No:	Partially:	
Comments (Progress):				
		•		
opy & Paste a third 200	06 Measured	Goal from the last ve	rsion of the Job Description	n:
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as the goal been met?	06 Measured Yes:	Goal from the last ve	rsion of the Job Description Partially:	n:
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as the goal been met?				n:
as the goal been met?		No:		n:
as the goal been met?			Partially:	n:
as the goal been met?		No:	Partially:	n:
as the goal been met?		No:	Partially:	n:
as the goal been met?		No:	Partially:	n:
opy & Paste a third 200 as the goal been met? omments (Progress):		No:	Partially:	n:

DB	Kills:
1.	Ability to effectively use equipment and computer applications that are needed to accomplish tasks. Comment. Rate Phone System Calculator Outlook Excel Word ETO Other
2.	Prioritization. Time management. Comment. Rate
3.	Organization. Filing. Ability to store and retrieve information through the use of the computer and through manual filing systems. Comment. Rate
4.	Follow-up skills and meeting deadlines. Completing tasks. Comment. Rate
5.	Quality and accuracy of work. Ability to check work, recognize errors and make corrections. Comment. Rate
6.	Ability to understand instructions, quick to learn. Comment. Rate
7.	Quantity/Productivity. Ability to carry out expected volume in a timely manner. Comment. Rate

8.	Creativity. Suggests new ideas and solutions for improvement. Comment. Rate
Intarn	ersonal Skills:
-	Consistently exhibits positive and professional behavior towards co-workers, managers, vendors and clients. Demonstrates a willingness and ability to communicate, cooperate and work with others. Consistently manages own emotions. Comment. Rate
2.	Answers phone calls and e-mails within 1-3 days maximum. Comment. Rate
3.	Ability to work as part of a team, attending appropriate meetings and demonstrated awareness of how the parts of the agency work in relation to the whole and to the mission statement. Comment. Rate
4.	Ability to verbally express self in a clear, concise and easily understood manner. Comment. Rate

5.	Ability to express written ideas in a clear and concise fashion. Comment. Rate
6.	Maintains confidentiality, both verbally and in written materials, in regard to both staff and clients. Comment. Rate
7.	Ability to use the manager in an appropriate manner. Describe the amount of supervision needed and the relationship with the supervisor. Comment. Rate
Mana	gement and Supervisory Skills
1.	Leadership and Motivation. Provides guidance and direction, motivates others and shares skills as appropriate. Comment. Rate
2.	Management Skills. Employee can effectively plan, delegate, coordinate and oversee projects or programs. Good follow-up and feedback skills with staff. Comment. Rate
3.	Teaching and Training. Manager or Coordinator can appropriately teach the employee when necessary or is effective in finding appropriate training. Comment. Rate

4.	Initiative. Employee seeks ways to improve programs, anticipate problems and seeks solutions. Comment. Rate
5.	Compliance with budgets and compliance with regulatory mandates from funding agencies. Comment. Rate
6.	Community Relations. Effectively interacts with community liaisons and committee members. Comment. Rate
7.	Uses sound judgment in decision making and problem solving. Recognizes problems or potential problems in a timely manner. Comment. Rate
8.	As a supervisor, employee is fair and objective. Comment. Rate
Other	Areas:
1.	Attendance, punctuality and dependability during the past year. Comment. Rate

2.	Employee dresses appropriately. Comment. Rate
	Responsibility. Employee takes responsibility for actions and responsibility for mistakes. Comment. Rate
	Adaptability. Employee is able to adapt to new or different requirements and/or interruptions. Can accommodate change. Comment. Rate
	Follows procedures and policy. Employee is familiar with and follows rules, procedures and regulations of the Agency. Comment. Rate
	Rating = See first page of this evaluation = add ratings, then divide by the r of questions that were rated =
	the employee received any special recognition or awards during the past year? No Explain if yes.
	the employee been involved in disciplinary action during the past year? No Explain if yes.

Has the employee participated in any in or out of house trainings during the past year? Yes No List if yes.
Recommendations for training: Please list.
Copy and Paste One 2007 Measurable Goal from the Updated Job Description:
Copy and I asic One 2007 ivicasurable doar from the Opdated 700 Description.
Copy and Paste a Second 2007 Measurable Goal from the Updated Job Description:

Training and Development

Copy and Paste a Third 2007 Measurable Goal from	the Updated Job Description:		
I have read this Performance Evaluation and have reviewed it with my supervisor(s). My signature indicates only that this evaluation has been read and discussed. Employee's			
signature does not signify agreement with the content			
Employee's signature	Date		
Supervisor(s) signature	Date		
Note: Employee may include a written response if so	desired		

Jewish Family Service of San Diego Performance Evaluation – Support Staff

ıme	
b Title	
valuation Period	

Purpose:

- To provide each employee with a clear understanding of job expectations
- To communicate honestly about performance that needs improvement and/or to recognize exceptional performance
- To listen to both employee and manager opinions about his/her performance
- To discuss goals for growth and development
- To provide both employee and manager with an ongoing tool to be used throughout the year

Instructions:

- First, the supervisor should review the job description with the employee.
- The supervisor should rate the employees performance during the past year or period being evaluated.
- If a question does not pertain to a particular employee, please enter N/A.
- Use your discretion as to which form will most likely match job duties. Some positions do not fit nicely into one category or another. Coordinators who manage volunteers should be evaluated using the Management/Coordinator form.
- The supervisor's completed form is to be signed and dated by both the manager and the employee and placed as a permanent document in the employee's personnel file. The review will be held in strict confidence.
- Please attach a copy of the job description to the evaluation.
- Please complete the annual evaluation by the end of March.
- AND PLEASE remember to use this evaluation as a tool throughout the year.

Rating Explanations:

- 5 = Exceeds all Expectations
 The staff member consistently excels in virtually all aspects of the job. The staff
 member demonstrates initiative by proposing new ventures, practices or
 procedures. The staff member is respected by colleagues and demonstrates a
 willingness to accept additional responsibilities not outlined in the job description.
 Performance is of a rare quality found only in a small percentage of people within
 the organization. A superior rating.
- 4 = Exceeds many Expectations and Meets all Expectations
 The staff member is competent and excels in all areas of the job and performs independently. The staff member shows initiative and commitment. Quality of work is clearly above average.

- 3 = Meets Expectations
 The staff member is competent in their work. They meet the standards of job
 performance for all aspects of the job. Performance is steady, reliable and is
 maintained with a minimum of supervision. Most employees fall into this
 category.
- 2 = Meets Some Expectations and Needs Improvement in Some Areas
 The staff member has demonstrated the ability to perform most basic job
 functions, but needs assistance in some areas. The staff member asks for
 assistance when appropriate, but needs additional training or experience to work
 on an independent basis. The staff member is committed to achieving the next
 level.
- 1 = Does Not Meet Expectations The staff member has not demonstrated the ability to perform the basic job responsibilities and does not perform on an independent basis. The staff member does not seek assistance when needed. The staff member has not demonstrated a willingness to improve. If improvement is not demonstrated within 3 months there may be grounds for termination.

Copy and Paste One 2006 Measured Goal from the last version of the Job Description:				
		•		
Has the goal been met?	Yes:	No:	Partially:	
Comments (Progress):				

Job Si	Ability to effectively use equipment and computer applications that are needed to accomplish tasks. Comment. Rate Phone System Calculator Outlook Excel Word ETO Other
2.	Prioritization. Time management. Comment. Rate
3.	Organization. Filing. Ability to store and retrieve information through the use of the computer and through manual filing systems. Comment. Rate
4.	Follow-up skills and meeting deadlines. Completing tasks. Comment. Rate
5.	Quality and accuracy of work. Ability to check work, recognize errors and make corrections. Comment. Rate
6.	Ability to understand instructions, quick to learn. Comment. Rate
	Quantity/Productivity. Ability to carry out expected volume in a timely manner. Comment. Rate

8.	Creativity. Suggests new ideas and solutions for improvement. Comment. Rate
	Consistently exhibits positive and professional behavior towards co-workers, managers, vendors and clients. Demonstrates a willingness and ability to communicate, cooperate and work with others. Consistently manages own emotions. Comment. Rate
2.	Answers phone calls and e-mails within 1-3 days maximum. Comment. Rate
3.	Ability to work as part of a team, attending appropriate meetings and demonstrated awareness of how the parts of the agency work in relation to the whole. Comment. Rate
4.	Ability to verbally express self in a clear, concise and easily understood manner. Comment. Rate

 Maintains confidentiality, both verbally and in written materials, in regard t staff and clients. Comment. Rate Ability to use the manager in an appropriate manner. Describe the amount of supervision needed and the relationship with the supervisor. Comment. Rate Other Areas: Attendance, punctuality and dependability during the past year. Comment. 	o both
7. Ability to use the manager in an appropriate manner. Describe the amount of supervision needed and the relationship with the supervisor. Comment. Rate Other Areas:	o both
7. Ability to use the manager in an appropriate manner. Describe the amount of supervision needed and the relationship with the supervisor. Comment. Rate Other Areas:	o both
supervision needed and the relationship with the supervisor. Comment. Rate Other Areas:	
supervision needed and the relationship with the supervisor. Comment. Rate Other Areas:	
supervision needed and the relationship with the supervisor. Comment. Rate Other Areas:	
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Rate	
2. Employee dresses appropriately. Comment. Rate	
3. Responsibility. Employee takes responsibility for actions and responsibility mistakes. Comment. Rate	c

4.	Adaptability. Employee is able to adapt to new or different requirements and/or interruptions. Can accommodate change. Comment. Rate
5.	Follows procedures and policy. Employee is familiar with and follows rules, procedures and regulations of the Agency. Comment. Rate
	Il Rating = See first page of this evaluation = add ratings, then divide by the er of questions that were rated =
	s the employee received any special recognition or awards during the past year? S No Explain if yes.
	s the employee been involved in disciplinary action during the past year? s No Explain if yes.
Traini	ng and Development
	s the employee participated in any in or out of house trainings during the past ar? Yes No List if yes.
Re	commendations for training: Please list.

Copy and Paste One 2007 Measurable Goal from the Updated Job Description:
Copy & Paste a Second 2007 Measurable Goal from the Updated Job Description:
Copy & Paste a Third 2007 Measurable Goal from the Updated Job Description:
I have read this Performance Evaluation and have reviewed it with my supervisor(s). My signature indicates only that this evaluation has been read and discussed. Employee's signature does not signify agreement with the contents of this evaluation.
Employee's signature
Supervisor(s) signature
Note: Employee may include a written response if so desired.



ANNUAL EVALUATION

POSITION:							
EMPLOYEE NAM	E:	RATING PERIOD: _					
A. AGENCY WIDI	E STANDARDS		A*	B [*Cod	C e defir	D red be	E low]
Compliance with:	Affirmative Action Guidelines						
	Patient Confidentiality/Records C	Confidentiality					
-	Handling of Funds						
B. PRIMARY [MF	EASURABLE] ACCOUNTABIL	<u>ITIES</u>					
2							
3.							
4.							
5.							
6.							

*Code Definition: A=Consistently exceeds expectations, B=Often exceeds expectations, C-Generally meets expectations D=Often fails to meet expectations, E=Consistently fails to meet expectations

C. AGENCY WIDE STANDARDS

Compliance with:	
Attendance	
Punctuality	
Annronriate Attire	
rippi opilate rittire	
Comments when out of	Compliance:
ETHERTHAL MANUFACTURE OF THE STORY OF THE ST	
Explanation of Ratings	that are A: Consistently Exceeds; or E: Consistently fails to meet expectations:
The second secon	

	Reviewer's Signatu	re Date	
imployee Comments (Optional):	:		

Annual Anniversary is target date for Completed Review



Jewish Family Service of San Diego

FAMILY SERVICE	ADN	IINISTRATIVI	LSUF		K	1 3	IAL	r EVALUATION		·
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i serving er e	Miscellaneous	Clerical Tasks				W	ora I	Processing		
	JOB PERFO	DRMANCE		F	RA	TI	NG	EXPLANATION	OR REMA	RKS
Exceller	nt, ${f V}$ ery good, ${f S}$ atisfac	tory, \mathbf{I} mprovement \mathbf{D} e	sired 👈	E	\mathbf{V}	S	ID			
Quanti	ty of Work									
Quality	of Work									
Comple	etion of Work on	Schedule								
Accura	cy of Work Perfo	ormed								
Neatne	ss of Work Produ	ıct								
Initiati	ve of Work Produ	uction								
Compli	iance With Work	Instruction								
Relatio	nship With Supe	rvisor								
Relatio	nship With Co-w	orkers								
	onship with Pro sional Staff	ogram Manager	s and							
Interfa	cility Communica	ation		***						
	Interface/Interac									
Adapta	ability to Work Si	tuation								
Work l	Interest		AND	*****						
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Attend			et est deste filmaterior et la facilità de la compression della co							
Соммі	ENTS:									
Employee	Signature	Supervisor S	ignature					Jill Borg Spitzer	Date	



Jewish Family Service of San Diego ADMINISTRATIVE SUPPORT STAFF EVALUATION

GOALS

NAME OF EMPLOYER	C:	DATE:				
POSITION:		EVALUATION FROM: _	то			
		FOR NEXT YEAR				
Employee Signature	Supervisor Signature	Jill Borg Spitzer D	Pate			



Category

Jewish Family Service of San Diego ADMINISTRATIVE SUPPORT STAFF EVALUATION

RATING GUIDE

OF SAN DIEGO	Noto	
Name of Employee: Position:		
E - EXCELLENT:		
V – VERY GOOD:		
S – SATISFACTORY:		
ID – IMPROVEMENT DESIRED:		
57 – 64 points – maximum available 44 – 56 points – moderate 32 – 43 points – minimum 31 & below – no merit		
E – EXCELLENT = 4 points V – Very Good = 3 points S – Satisfactory = 2 points ID – Improvement Desired = 1 point		

Total Points



Jewish Family Service of San Diego

MANAGEMENT STAFF EVALUATION

SERVICE OF SAN DIEGO NAME OF EMPLO	OYEE:					DATE:	
POSITION:	EVALUATIO	ON	FR	OM	[:	TO	
CHARACTERIS	TIC	R	AT.	ING	(EXPLANATIO	ON OR REMARKS
Excellent, Very good, Satisfactory, Im	provement Desired TM	Е	V	S	ID		
1. Quality and Quantity of Work: T							
description are they performed adequa							
of work performed; consistency of out							
2. Relationships With Others: Const							
cooperativeness; fairness; self-control;							
dealing with fellow employees, superior	ors, and the public.						
3. Work Habits: Consider ability to p	olan and organize						
work; dependability; foresight and judg	gement; adherence to						
rules and procedures; attendance.							
4. Work Interest: Consider attitude to	oward fulfillment of						
job responsibilities; receptivity to new	work assignments;						
response to supervision; efforts to acqu	iire broader						
knowledge of job.							
5. Adaptability: Consider ability to a	djust to work situation;						
to changes in volume or pressure of wo	ork; changes in work						
assignment or location.							
6. Leadership Capability: Consider a							
loyalty, cooperation and teamwork wit							
7. Instruction Skill: Consider capacit							
information, analyze and explain pract							
methods. Skill in training and develop	oing staff (when						
applicable).							
8. Judgement: Consider soundness of							
analyze situation and people; ability to							
objectively weigh facts before making							
9. Operational Skills: Effectiveness i							
running; effectiveness of delegation of							
Consider ability to plan and execute su							
Able to develop and oversee program	budgets and conduct						
program evaluations.	·					WATER STORY OF THE	
10. Resourcefulness: Consider initiat							
enterprise displayed in meeting proble ideas.	ms; contribution of						
11. Coordination and Cooperation:	Consider cooperation	-					
wit other individuals and offices; relati	*						
services; teamwork in promoting effect							
NARRATIVE SUMMAR							
NANNATIVE SUMMAN	A. Æ ≠						
Staff Member	Date				S	upervisor	Date
	Jill Borg Spit	zer,	Exe	cuti	⁄e Din	ector	Date

Jewish Family Service of San Diego MANAGEMENT STAFF EVALUATION NAME OF EMPLOYEE: ______ DATE: _____ **POSITION: EVALUATION FROM:** TO RATING GUIDE Name of Employee: _______ Date:_____ Evaluation from: Position: to _____ **RATING GUIDE** E - EXCELLENT: V - VERY GOOD: S - SATISFACTORY: ID – IMPROVEMENT DESIRED:

39-44 points – maximum available

30-38 points – moderate

22-29 points - minimum

21 & below - no merit

"	/	0	9	10	11	Total Points
						Points



Jewish Family Service of San Diego

MANAGEMENT STAFF EVALUATION

GOALS

F SAN DIEG		/ee:	Date:	
Position:			Evaluation from:	to
		GOALS FO	DR NEXT YEAR	
Employee	Signature	Supervisor Signature	Jill Borg Spitzer	Date

Executive Director



PERFORMANCE EVALUATION FOR OFFICE MANAGERS & ALL CLERICAL STAFF

	Typ	pe: 🗆 Annual	☐ Probation	☐ Bi-Annual	☐ Special
	Rev	iew Period:			
	Dat	e Of Last Evalua	tion:		
Employee Name:	Address and the second	***************************************			
ID#:	DOH:		Date In Curre	nt Position:	
Job Title:					
Department:		No. of the Control of			The second secon
Reviewer Name:			Reviewer Title		
		THE LANGE THE PROPERTY AND ADMINISTRATION OF THE PROPERTY ADMINISTRATION OF THE PROPERTY AND ADMINISTRATION OF THE PROPERTY AND ADMINISTRATION OF THE PROPERTY ADMINI			
RATINGS:	<u>Satisfactory</u>	Needs In	nprovement	<u>Unacceptabl</u>	<u>e</u>
	□5 □4		□3	Q 2 Q 1	
		to the May 17 May 18 Ma			

PERFORMANCE	STANDARD	KATING	COMMENIS
1. Knowledge of job duties	Is familiar with correct procedures for handling all aspects of duties.		
2. Computer Skills	Can perform computer related tasks efficiently including Anasazi (as required by funding source).		
3. Initiative	Seeks ways to improve program, anticipates problems and seeks solutions.		
PERFORMANCE	STANDARD	RATING	COMMENTS

4. Leadership	Provides guidance and direction, motivates others, and shares skills as appropriate.		
5. Reliability	Dependable in completing tasks, and follow-ups in timely manner.		
6. Teamwork	Integrates own work with larger group-on all levels; shows and receives respect to and from team members. Recognizes special skills and knowledge of team members; able to draw on this appropriately.		
7. Attendance/Punctuality	Maintains acceptable levels of attendance; provides advanced notice of absence and lateness; arrives and departs at designated times; maintains appropriate lunch and break leaves with appropriate notification for changes.		
8. Management Skills	Plans, organizes, delegates, coordinates, and oversees as assigned. Mentors, as assigned. Able to work effectively with supervisors and supervisees.		
9. Communication Skills	Expresses ideas and thoughts verbally Expresses ideas and thoughts in written format Exhibits good listening and comprehension Keeps management and co-workers adequately informed. Interacts appropriately with consumers/clientele Maintains professional boundaries with co-workers, consumers, and outside agencies.		
10. Personal Appearance	Dresses appropriately and keeps self well-groomed.		

SUMMARY:			
GOAL / PLAN FOR IMPROVEN	MENT:		
EMPLOYEE COMMENTS:			
Employee Acknowledgement:			of the Control of the
I have reviewed this evaluation and discussed the my performance status and does not necessarily			I have been advised
Employee Signature		Date	
Reviewer Comments:			
Next Evaluation Due	Type :	□ Annual	☐ Probation
vext Evaluation Duc		☐ Bi-Annual	☐ Special
Reviewer Signafure		Date	



PERFORMANCE EVALUATION For

Managers / Directors of Program & Support Departments

•			
	Type: Annual	☐ Probation	☐ Bi-Annual ☐ Special
	Review Period:		
	Date Of Last Evaluat	ion:	
Employee Name:			
ID#: DOH:			ent Position:
Job Title:	V Norwega za a nega oraș și diname și diname și diname și diname per diname zone zone zone zone zone zone zone		
Department:			
Reviewer Name:		Reviewer Title	e
Performance Competencies: Mission Achieves results for recipients of services Implements agency policies Represents agency well Goes above and beyond when appropriate Is dependable, reliable and consistent	realizada a colonida (m. 1900) de la colonida e la colonida de colonida de la colonida de la colonida del colonida de la colonida del colonida de la colonida de la colonida del colonida	Overall	NI ST ER OST N/A Low <> High
Expresses ideas and thoughts verbally Expresses ideas and thoughts in written form Exhibits good listening and comprehension Keeps others adequately informed Selects and uses appropriate communication method	ds	Overell	N/A

Cost Consciousness		
		NI ST ER OST
Follows agency's fiscal procedures		N/A Low <> High
Follows agency's fiscal procedures Works within approved budget		
Conserves organizational resources		
Develops and implements cost saving measures		
Contributes to agency's fiscal health		
	Overall	
Delegation		
Delegation		NI ST ER OST
		N/A $Low <> High$
Delegates work assignments		
Matches the responsibility to the person		
Gives authority to work independently Sets expectations and monitors delegated activities		
Provides recognition for results		
	Overall	
Job Knowledge		
505 Kilowicage		NI ST ER OST
		N/A Low <> High
Competent in required job skills and knowledge		
Exhibits ability to learn and apply new skills		
Keeps abreast of current developments Requires minimal supervision		
Displays understanding of how job relates to others		
	Overall	
Judgment		
		NI ST ER OST
		N/A Low <> High
Displays willingness to make decisions		
Exhibits sound and accurate judgment Supports and explains reasoning for decisions		
Includes appropriate people in decision making process		
Makes timely decisions		
	Overall	
Leadership		
•		NI ST ER OST
Dubiblie confidence in a 10 - 1 - 4		N/A Low <> High
Exhibits confidence in self and others Inspires respect and trust		
Reacts well under pressure		
Shows courage to take action		
Motivates others to perform well		

Overall

Managing People				~ ~		
		37/4				OST
Provides direction and gains compliance		N/A	Low	<	>	High
Includes subordinates in planning						
Takes responsibility for subordinates' activities						
Provides regular performance feedback						
Develops subordinates' skills and encourages growth						
	Overall					
Problem Solving				~~		
		37/4				OST
Identifies problems in a timely manner		N/A	Low	<	>	High
Gathers and analyzes information skillfully					·	
Develops alternative solutions						
Resolves problems in early stages						
Works well in group problem solving situations					<u> </u>	
	Overall					
Quality						
Quality			NI	CT.	י פיזו	ОСТ
		N/A			>	
Demonstrates accuracy and thoroughness]]				
Displays commitment to excellence						
Looks for ways to improve and promote quality						
Applies feedback to improve performance						
Monitors own work to ensure quality	0 "					<u> </u>
	Overall					

RATING RANGES		DEFINITIONS
OST	Outstanding Performance	Highly exceeds all agreed upon job requirements to a degree seldom achieved by others in the same level job.
ER	Exceeds Job Requirements	Performance often exceeds all agreed upon requirements. Often does more work of high quality and quantity.
ST	Meets Job Requirements	Work is fully satisfactory. Performance consistently meets agreed upon job requirements.
NI	Needs Improvement	Performance standards are not fully achieved; improvement is needed to meet agreed upon job requirements.

SUMMARY:			
			Western Control of the Control of th
PLAN FOR IMPROVEMENT:			
			· · · · · · · · · · · · · · · · · · ·
EMPLOYEE COMMENTS:			
Employee Acknowledgement:			
I have reviewed this evaluation and discusse I have been advised of my performance state evaluation.			
Employee Signature	Dat	e	_
Reviewer Comments:			
Next Evaluation Due	Type:	☐ Annual	☐ Probation
		☐ Bi-Annual	☐ Special
Reviewer Signature	***************************************	Date	



EMPLOYEE PERFORMANCE APPRAISAL

Department:	Year: 2006-2007
Employee:	
Position:	
Supervisor:	

Performance Appraisal Process

You and your supervisor meet on the anniversary of your hire date to review your job description, job performance, accomplishment of objectives, and job development plan. You will develop new objectives for the coming year. The appraisal includes a supervisor's narrative that summarizes your achievements and/or specifies necessary improvements and your own comments.

Job Description

The job description describes the essential functions of your position. Review the job description with your employee/supervisor and revise if necessary. Discuss performance in relation to the job description. Attach a copy of the job description to the packet.

Objectives

Objectives are measurable outcomes with a timeframe that you will accomplish in the context of your job over the next year. The previous year's objectives are reviewed at the supervisor/employee performance appraisal meeting and new objectives are developed. At least one objective should reflect a new achievement. List objectives and action steps that will help achieve the stated objective.

Job Development Plan

Each employee must have a job development plan which outlines activities for your personal and professional growth. The plan may include such things as classes or workshops you will attend, agency in-services or individual inquiry and research.

All appraisals must be signed and dated by employee and supervisor. The supervisor submits a complete packet to Human Resources and to the Director.

Employee Name	Date
EMPLOYEE PERFORMANCE APPRAISAL: OBJ	
Performance and Professional Development Planning Forthan 2. One objective must include the Job Development	
OBJECTIVE #1:	
Action Steps:	Time Cycles
1.	
2.	
3.	
Supervisor Comments:	Mid year review date
Supervisor Comments:	Yearend review date
Objective #1	Attained
OBJECTIVE #2:	
Action Steps:	Time Frame
1.	
2.	
3.	
Supervisor Comments:	Mid year review date
Supervisor Comments:	Yearend review date
Objective #2 Attained Partially Attained	d Not Attained

Employee Name	Date
EMPLOYEE PERFORMANCE APPRAISAL:	
OBJECTIVE #3:	
Action Steps:	Time Frame
1.	Transe
2.	
3.	
Supervisor Comments:	Mid year review date
Supervisor Comments:	Yearend review date
Objective #3 Attained Partially Atta	ained Not Attained
OBJECTIVE #4:	
Action Steps:	Time Frame
1.	
2.	
3.	
Supervisor Comments:	Mid year review date
Supervisor Comments:	Yearend review date
Objective #4 Attained Partially Attained	☐ Not Attained

Employee Name	Date
EMPLOYEE PERFORMANCE APPRAISAL: JOB DEVELOR	
Professional Associations you belong to:	
Professional Training and Development Activities: (List any w	vorkshop, seminar, in-service,
research you hope to complete during the year)	
Training Completed:	

Employee Name	Doto					
Employee Name Date Date EMPLOYEE PERFORMANCE APPRAISAL: NARRATIVE AND SIGNATURES						
Supervisor Narrative:						
The supervisor and employee have reviewed and discussed p	erformance f	or the cu	rrent period:			
Employee:	_ Date					
Supervisor:	_ Date					
Director:	Date	1	/			
Employee Comments:		•				

JEWISH FAMILY SERVICES PROFESSIONAL PERFORMANCE APPRAISAL

Employee Name:	Po	osition:				
Supervisors Name:	De	epartment:				
Review Term: From:	Da	ate:				
1. Summary of Past Performance	e (Based on co	mmunicated go	oals and expecta	tions)		
	Construction to the Construction of the Construction Cons	M110044 W WALKER				
2. Strengths (specific examples	of things to ke	ep doing)				
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			·······			
3 Areas for Improvement (Speci						
3. Areas for Improvement (Specific examples where improvement is necessary)						
		<u> </u>				
A tab valated abilia	Access to the latest terms of the latest terms					
4. Job related skills						
Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Comments		
Knowledge of job						
Quality of work with clients						
Produces results						
Planning, organization, efficiency						
Paper work completion						
Computer literacy						

French/English Bilingualism

Communication Skills

5. Work Attitudes		1			
Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Comments	
Assumes responsibility					
Takes initiative					
Judgment in problem solving & decision making			·		
Works cooperatively with others					
Accepts feedback					
Reliability/promptness		·			
Dependability					
Adaptability					
Creativity					
7. Employee's comments and co	onfirmation				
Employee's Signature:		Sup	pervisor's Signature:		

JEWISH FAMILY SERVICES SUPERVISOR/MANAGER PERFORMANCE APPRAISAL

Employee Name:	Po	sition:		
Supervisors Name:	De	epartment:		
Review Term: From:	Da	ite:		
1. Summary of Past Performance	e (Based on co	mmunicated go	als and expecta	tions)
2. Strengths (specific examples	of things to ke	ep doing)		
3. Areas for Improvement (Spec	ific examples w	here improvem	ent is necessary	')
4. Management/Supervisory Ski	lls	·		
Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Comments
Develops/shares vision/direction (promotes agency goals)				
Motivates others; promotes growth & development of staff				
Optimizes lay relationships				·
Creativity				
Works collaboratively				WANTE WHEN A TWO TO THE TOTAL THE WANTE WHEN THE
Works independently				
Uses sound judgment in seeking assistance				

5. Work Attitudes					
Criteria	Exceeos Expectations	Meets Expectations	Below Expectations	Comments	
Sense of responsibility (takes ownership)					
Takes initiative					
Fairness					
Objectivity					
Ability to represent agency					
Acceptance of feedback					
5. Work Quality & Habits					
Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Comments	
Accuracy & thoroughness of work					
Knowledge/skills to effectively perform job					
Judgment in problem solving & decision making					
Adapts to change					
Ability to work under stress					
Verbal & written communication					
Planning, organization. efficiency					
6. Performance Expectations (M	casurable object	ctives for the co	ming year		
o. Fertormance Expectations (m	easurable Objec	ouves for the co	ming year)		
7. Employee's comments and confirmation					
	- A Color - A Co				

Employee's Signature:

JEWISH FAMILY SERVICES EMPLOYEE INPUT FORM - PERFORMANCE APPRAISAL

Employee Name:	Supervisors Name:
Date of Performance Appraisal:	
1. What are the 3 or 4 principal responsibilit	ies of your job?
2. What are some things that you have done	particularly well in the last year? (Special achievements)
3. What are some things you feel you could	have done better in the past year?
A Miles to a continue in the c	-in-n
4. What would you like to achieve in the con	ning year?
5. What can I (your supervisor) do to help yo	ou achieve your goals?

JEWISH FAMILY SERVICES PROFESSIONAL PERFORMANCE APPRAISAL

Departed on co	Date:	als and expectations)
e (Based on co		als and expectations)
e (Based on co	mmunicated go	als and expectations)
W. W		
of things to kee	ep doing)	
	_	
fic examples w	here improvem	ent is necessary)
Satisfactory	Needs	Comments
Calistaciony	mprovement	Comments
A STATE OF THE STA		
		AND THE RESERVE OF THE PROPERTY OF THE PROPERT
the state of the s		
		1

French/English Bilingualism				
Communication Skills				
5. Work Attitudes	A CONTRACTOR OF THE PARTY OF TH	CONTRACTOR OF THE STATE OF THE		W/25
		Needs		
Criteria	Satisfactory	Improvement	Comments	
Assumes responsibility				
Takes initiative				
Judgment in problem solving & decision making				
Works cooperatively with others				
Accepts feedback	,			
Reliability/promptness				
Dependability				
Adaptability				
Creativity				
C. Danfarrana Carrantations (8)	la a sura bia a bia	edives for the se	and a read	
6. Performance Expectations (M	easurable obje	cuves for the co	oming year)	
•				
7. Employee's comments and co	onfirmation			A. M. S.
And the second s		The state of the s		
Employee's Signature:		Su	pervisor's Signature:	

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JEWISH FAMILY SERVICES ADMINISTRATIVE STAFF PERFORMANCE APPRAISAL

Employee Name:	Po	osition:				
Supervisors Name:	De	epartment:				
Review Term: From:	Da	ate:				
1. Summary of Past Performance	Summary of Past Performance (Based on communicated goals and expectations)					
2. Strengths (specific examples	of things to kee	ep doing)				
·						
3. Areas for Improvement (Spec	ific examples w	here improvem	ent is necessary)			
4. Job Related Skills	The second secon	All the Burney and the State of				
		Needs				
Criteria	Satisfactory	Improvement	Comments			
Quality of work (eg. thoroughness, consistency, accuracy)						
Productivity (quantity of work)						
Knowledge of job						
Computer Literacy	A STATE OF THE STA					
Technical skills	W. F. C.					
French/English Bilingualism						

Communication skills

5. Work Attitudes			
		Needs	
Criteria	Satisfactory	Improvement	Comments
Acceptance of supervision			
Works cooperatively with others			
Assumes Responsibility			
Reliability/promptness			
Dependability (eg. Conscientiousness, accuracy)			
6. Performance Expectations (M	easurable obje	cuves for the co	mmg year)
7. Employee's comments and co	onfirmation		
Employee's Signature:		Sur	pervisor's Signature:

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JEWISH FAMILY SERVICES SUPERVISOR/MANAGER PERFORMANCE APPRAISAL

Employee Name:	Po	osition:	
Supervisors Name:	De	epartment:	
Review Term: From:	Da	ate:	
1. Summary of Past Performance	ce (Based on co	mmunicated go	als and expectations)
2. Strengths (specific examples	of things to ke	ep doing)	
3. Areas for Improvement (Spec	ific examples w	here improvem	ent is necessary)
4. Management/Supervisory Sk	ills		
Criteria	Satisfactory	Needs Improvement	Comments
Develops/shares vision/direction (promotes agency goals)			
Motivates others; promotes growth & development of staff			
Optimizes lay relationships			
Creativity			
Works collaboratively			
Works independently			
Uses sound judgment in seeking assistance			

5. Work Attitudes						
Criteria	Satistactory	Needs Improvement	Comments			
Sense of responsibility (takes ownership)						
Takes initiative						
Fairness						
Objectivity						
Ability to represent agency						
Acceptance of feedback						
6. Work Quality & Habits	· · · · · · · · · · · · · · · · · · ·					
		Needs				
Criteria	Satisfactory	Improvement	Comments			
Accuracy & thoroughness of work						
Knowledge/skills to effectively perform job						
Judgment in problem solving & decision making						
Adapts to change						
Ability to work under stress						
Verbal & written communication						
Planning, organization. efficiency						
7 Dayfaymana Eynactations (M		tives for the se				
7. Performance Expectations (M	easurable objec	tives for the co	ming year)			
			·			
		THE ASSESSMENT OF THE STREET O				
8. Employee's comments and co	9 Employoo's comments and confirmation					
or amproject definitions did to						

Employee's Signature:

Supervisor's Signature:

JEWISH FAMILY SERVICES EMPLOYEE INPUT FORM – PERFORMANCE APPRAISAL

Employee Name:

Supervisors Name:

Date of Performar	nce Appraisal:
-------------------	----------------

1. What are the 3 or 4 principal responsibilities of your job?	
2. What are some things that you have done particularly well in the last year? (Special achievements)	
2. What are come things you feel you could have done better in the west year?	
3. What are some things you feel you could have done better in the past year?	
4. What would you like to achieve in the coming year?	
5. What can I (your supervisor) do to help you achieve your goals?	



PERFORMANCE EVALUATION FORM

CHECK THE APPROPRIATE LINE	
Successfully Completed Orientation	
Interim Evaluation	MATERIA WAR WAR WAR WAR WAR WAR WAR WAR WAR WA
Annual Evaluation	

Name:

Job Title:

Department:

Appraisal Period:

XX/XX/XX to XX/XX/XX

Considering all performance objectives, priorities, and performance factors, select the rating level that best describes this employee's performance during the rating period.

1 = Does Not Meet Expectations

The staff member has not demonstrated an ability to perform the basic job responsibilities and does not perform on an independent basis. The staff member has not demonstrated initiative and does not seek assistance when they encounter difficulties. The staff member has not demonstrated a willingness to improve their performance or participate in the training and supervision necessary to achieve the supervisor's expectations. The work done by the individual is unacceptable.

2 = Meets Some Expectations, Does Not Meet All

The staff member has demonstrated an ability to perform **most** basic job responsibilities, but needs assistance with some areas. The staff member asks for assistance when appropriate, but needs additional training or experience to work on an independent basis. The staff member **participates** in supervision and or training and is committed to achieving the performance level expected by the supervisor. **The work done by the individual needs improvement.**

3 = Meets Expectations

The staff member is competent in all areas of their job and performs independently. The staff member asks questions, seeks assistance, or makes suggestions as appropriate. The staff member may participate in committees, agency-wide initiatives, or special projects while maintaining an appropriate level of performance. The staff member shows some initiative and commitment to the agency. **The work done by the individual is good.**

4 = Meets All Expectations, Exceeds Many Expectations

The staff member is competent and excels in all areas of the job and performs independently. In addition to the assigned responsibilities, the staff member shows initiative and commitment. The staff member proposes and implements job-related improvements. The work done by the individual is very good.

5 = Exceeds All Expectations

The staff member is competent in all areas of their job and performs independently. On a consistent basis, the staff member demonstrates initiative by proposing new ventures, practices and/or procedures, or venues that would benefit the agency's mission and vision. The staff member is respected by colleagues. The are regular participants in agency-wide projects. The staff member demonstrates a willingness to accept additional responsibilities not outlined in the job description as appropriate.

The work done by the individual is excellent!

D 41:	and Bright and a water
	s and Responsibilities:
1.	•
	Weight
	Comments:
2.	
	Weight X Rate = Score
	Comments:
2	
3.	
	Weight X Rate = Score
	Comments:
4.	
	Weight = Score
	Comments:
5.	
	Weight X Rate = Score
	Comments:
	Commens.
6.	
	Weight
	Comments:
7.	

Comments:

Determining th	e Total Score		
Step One:	For Each Responsibility Multiply the	Weight and the Rate to Determine	The Score
Step Two:	Add Together All The Scores		
Enter the Total	Score Here:		
Determining th	e Weighted Average Rate:		
Step One:	Divide Total Score By 100		
Enter The Ave	age Weighted Rate Here:		
	igible for a COLA (Cost of Living Adjustr greater, with no single element rated bel		nber's Average Weighted Rate
	igible for a Performance Based Step rais ement rated below a 2.	se, the staff member's Average Weigh	nted Rate must be 3 or above
SUPERVISOR'	S COMMENTS (OPTIONAL)		
	ow overall evaluation was determined, his trongly to the overall evaluation.	ghlighting ratings on specific performa	ince objectives and factors that
	ER' S GOALS ber is required to list at least three goals es identified in the Development Plan.	s for the coming Evaluation Period. If a	appropriate, the goals should
STAFF MEMBE	R'S COMMENTS		
i e	ow overall evaluation were determined, most strongly to the overall evaluation.	highlighting ratings on specific perform	nance objectives and factors
SIGNATURES			
	this document, discussed its contents w dicates that I have been advised of my p		
Employee	Date	Supervisor	Date
Department Dire	ector Date	Human Resources	Date
Employee, Sup	the completed evaluation to Human ervisor, and Department Director hav ance evaluations/blank performance eva	ve signed them.	ered incomplete until the

Staff Name Date	
Training/Staff Development Plan	
TRAINING NEEDS – Those areas identified by the supervisor and employee in order to enhance the employee's current skills.	
□Clinical Please specify:	
□Supervisory Please specify:	
☐ Technical (Computer hard and software programs) Please specify:	
☐ Administrative Please specify:	
☐Other Competencies Please specify:	
DEVELOPMENT PLAN	
If a 2 or lower rating is given, prepare a development plan that includes at least two developmental goals. Goals may be related to increasing the employee's technical knowledge, supervisory skills, or improved performance in any performance measure. If training is needed to address these areas, include these in the training plan above.	
Rev. 8/05	

WESTCHESTER JEWISH COMMUNITY SERVICES, INC. ADMINISTRATIVE LEADERSHIP STAFF

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Staff Member's Name	
Staff Member's Title	
Supervisor's Name & Title	
TO VIDE OF THE AT THOSE	
TYPE OF EVALUATION:	PERIODIC
EVALUATION DATES:	
FROM:	TO:
INSTRUCTIONS:	

Basic instructions for completing the Performance Evaluation Form are outlined below. For additional guidance, consult your Supervisor, or a member of the Office of Human Resources.

ASSIGN A RATING FOR THE EMPLOYEE'S PERFORMANCE FOR EACH CATEGORY USING THE FOLLOWING GUIDELINES:

Outstanding:

Far exceeds requirements

Very Good:

Often exceeds requirements

Satisfactory:

Meets requirements of position

Needs Improvement:

Does not meet minimum job requirements

Unsatisfactory:

Not Acceptable

COMPLETE THE EXPLANATION SECTION WITHIN EACH CATEGORY. If A CATEGORY DOES NOT PERTAIN TO A PARTICULAR EMPLOYEE, PLEASE ENTER "NOT APPLICABLE", OR "N/A".

THE COMPLETED PERFORMANCE EVALUATION IS TO BE SIGNED BY BOTH THE SUPERVISOR AND THE EMPLOYEE. THE SIGNED AND COMPLETED FORM IS THEN TO BE REVIEWED AND SIGNED BY THE SUPERVISOR'S IMMEDIATE SUPERVISOR AND THEN SENT TO THE OFFICE OF HUMAN RESOURCES.

A. Brief description of individual's responsibilities.
B. Performance Evaluation 1. Record of attendance and punctuality during the last year.
[]Outstanding
[]Very Good []Satisfactory
[]Needs Improvement
[]Unsatisfactory
Explain.
2. Planning and Organization of Work Consider such variables as: Efficient use of time; timeliness of paperwork, ability to establish priorities.
[]Outstanding
[]Very Good []Satisfactory
[]Needs Improvement
[]Unsatisfactory Explain.
•
3. Initiative and Innovation
Consider such variables as: self starts, takes responsibility, makes efforts in face of obstacles; offers suggestions, implements new and sound ideas.
[]Outstanding
[]Very Good []Satisfactory
[]Needs Improvement
[]Unsatisfactory Explain.

4. Communication Ability to communicate with agency staff members, clients and community agencies with particular sensitivity. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
•
C. Supervision 1. Administrative Supervision Ability to delegate tasks, communicate objectives, and obtain timely compliance with agency and regulatory mandates. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
2. Leadership
Ability to inspire and motivate staff. Ability to develop and communicate new ideas.
[]Outstanding
[]Very Good
[]Satisfactory
[]Needs Improvement
[]Unsatisfactory

Explain.

3. DelegationAbility to assign tasks

[]Outstanding

[]Very Good []Satisfactory
[]Needs Improvement []Unsatisfactory Explain.
Explain.
4. Performance Management Ability to evaluate staff performance on an individual and group basis, and provide effective feedback. []Outstanding []Very Good []Satisfactory []Needs Improvement
[]Unsatisfactory Explain.
5. Training and Development Ability to provide training and promote staff development []Outstanding []Very Good []Satisfactory []Needs Improvement
[]Unsatisfactory Explain.

6. Follow-upAbility to follow up on all required work by supervisees.

[]Outstanding

[]Very Good []Satisfactory []Needs Improvement []Unsatisfactory
Explain.
7. Recordkeeping Ability to keep accurate documentation related to job responsibilities and to ensure that staff maintains accurate documentation. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
Explain.
D. Recognition of Work Performance 1. Has the employee received special recognition for exemplary performance during the past year? []Yes []No If yes, describe.
2. Has employee been involved in disciplinary action during past year? []Yes []No If yes, explain.
3. Have complaints been filed on employee? []Yes []No If yes, has investigation found employee in compliance with agency standards? []Yes []No If no, explain.

E. Quality Improvement (QI) Describe employee's knowledge of the Agency and its servces and how job responsibilities fit into overall Agency functioning.
2. Has the employee participated in any of the following QAI committees: Training and Development, Peer Review, Risk Management, Incident Investigation and Review, Safety Management, Infection Control. []Yes []No If yes, explain.
3. Ability to deal with consumer complaints and/or staff complaints []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
F. Staff Development 1. Has employee participated in any Agency staff development programs []Yes []No If yes, explain and list courses taken since last evaluation.

2. Has employee participated in out-of-agency training? $[\]$ Yes $\ [\]$ No If yes, list particulars.

3. Recommendations for further training:

ACCOUNTING SUPERVISORS

Job Skills

Ability to maintain books and detailed records of cash receipts, disbursements, general journal, and payroll

- []Outstanding
- []Very Good
- []Satisfactory
- []Needs Improvement

[]Unsatisfactory		
Ability to review reimbursement claims to ensure complia	ance with internal rules and accounting standards	
[]Outstanding []Very Good		
[]Satisfactory		
[]Needs Improvement []Unsatisfactory		
	receipts, disbursements and schedules in order to prepare	
general ledger trial balances. []Outstanding		
[]Very Good		
[]Satisfactory []Needs Improvement		
[]Unsatisfactory		
Ability to prepare working papers, financial statements an	d schedules	
Outstanding Very Good		
[]Satisfactory		
[]Needs Improvement []Unsatisfactory		
COALS		
GOALS		
A. Progress in Achieving Mutually established goals:		

B. State mutually established performance goals for ne	xt evaluation:
	The second secon
SIGNAT	TURES

Date

SUPERVISOR'S SIGNATURE:_

EMPLOYEE BEING EVALUATED:

I have read this Performance Evaluation and have reviewed it with my supervisor(s).

(Note: Employee's signature indicates only that this performance evaluation has been read. Employee's signature does not signify agreement with the contents of this Performance Evaluation. Employee may provide a written response.

Employee's Signature		Date	
Reviewed By		Date	
Received By		Date	
	Office of Human Resources Signature		

Westchester Jewish Community Services, Inc. PERFORMANCE EVALUATION - SUPPORT STAFF

Staff Member's Name		
Staff Member's Title		
Supervisor's Name & Title		
TYPE OF EVALUATION:		
[]INITIAL	[]PERIODIC	
EVALUATION DATES: FROM:	то:	

INSTRUCTIONS

Basic instructions for completing the Performance Evaluation Form are outlined below. For additional quidance, consult your Supervisor, or a member of the Office of Human Resources.

ASSIGN A RATING FOR THE EMPLOYEE'S PERFORMANCE FOR EACH CATEGORY USING THE FOLLOWING GUIDELINES:

Outstanding:

Far exceeds requirements

Very Good: Often exceeds requirements
Satisfactory: Meets requirements of position

Needs Improvement: Does not meet minimum job requirements

Unsatisfactory:

Not Acceptable

COMPLETE THE EXPLANATION SECTION WITHIN EACH CATEGORY. IF A CATEGORY DOES NOT PERTAIN TO A PARTICULAR EMPLOYEE, PLEASE ENTER "NOT APPLICABLE", OR "N/A".

REVIEW THE PERFORMANCE EVALUATION AND GOALS WITH THE EMPLOYEE. THE COMPLETED PERFORMANCE EVALUATION IS TO BE SIGNED BY BOTH THE SUPERVISOR AND THE STAFF MEMBER. THE SIGNED AND COMPLETED FORM IS THEN TO BE REVIEWED AND SIGNED BY THE SUPERVISOR'S IMMEDIATE SUPERVISOR AND FORWARDED TO THE OFFICE OF HUMAN RESOURCES.

BRIEF DESCRIPTION OF INDIVIDUAL'S RESPONSIBILITIES

PERFORMANCE EVALUATION A. Job Knowledge Understanding of basic principles required to perform job responsibilities. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
B. Job Skills 1. Ability to effectively use equipment that is needed to accomplish job tasks. (computers, telephone systems, calculators, typewriters) []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
2. Familiarity with computer applications used to accomplish tasks. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
C. Planning and Organization of Work Consider such variables as: efficient use of time; timeliness of paperwork; ability to establish priorities. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

-	
	D. Record keeping Ability to store and retrieve various kinds of information through the use of computerized and manual filing systems. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
	E. Communication Skills 1. Ability to respond to the public in a courteous and sensitive manner. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
	2. Ability to record and relay information accurately. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
	3. Able to verbally express self in a clear, concise and easily understood manner. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
	4. Able to express written ideas in a clear, concise fashion. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

F. Quality of Work 1. Learning: able to grasp instructions; quick to learn. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
2. Accuracy: Ability to recognize errors, and make corrections. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
G. Productivity: Ability to carry out expected volume of work in a timely manner. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
H. Relationships with Other Staff Maintains positive relationships with all staff; is able to work together with others toward common goals; is able to work as part of a team. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
I. Attendance & Punctuality Attendance and punctuality record during last year. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

J. Supervision: Ability to use supervisor in an appropriate manner. Describe amount of supervision needed and relationship with supervisor. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
K Has employee received special recognition for exemplary performance during the past year? []Yes []No If yes, explain
L Has employee been involved in disciplinary action during the past year? []Yes []No If yes, explain
M. Staff Development 1. Has employee participated in any Agency staff development programs? []Yes []No If yes, explain and list courses taken since last evaluation.
2. Has employee participated in out-of-agency training? []Yes []No If yes, list particulars.
3. Recommendations for further training.
N. Quality Assessment and improvement 1. Describe employee's knowledge of the Agency and its services and how job responsibilities fit into overall Agency functioning

2. Has the employee participated in any of the following QI committees: Training and Development, Peer Review, Risk Management, Incident Investigation and Review, Safety Management, Infection Control. []Yes []No If yes Explain.	
3. Ability to deal with consumer complaints and/or staff complaints. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory	
A. Progress in achieving mutually established go	
GOAL	PROGRESS

B. Mutually established performance goals for next	t evaluation:
SIGNAT	URES
Supervisor's Signature:	Date:
EMPLOYEE BEING EVALUATED:	
I have read this Performance Evaluation and	have reviewed it with my supervisor(s).
(Note: Employee's signature indicates only to read. Employee's signature does not this Performance Evaluation. Employed	t signify agreement with the contents of
Employee's Signature	Date
Reviewed By	Date
Received ByOffice of Human Resources S	Dateignature

WESTCHESTER JEWISH COMMUNITY SERVICES, INC. PERFORMANCE EVALUATION PROGRAM DIRECTORS AND SUPERVISORS

Staff Member's Name	
Staff Member's Title	
Supervisor's Name & Title	
TYPE OF EVALUATION: [] INITIAL [] PERIODIC	
EVALUATION DATES: FROM: TO:	
EMPLOYEE'S DISCIPLINE: []Case Management	
INSTRUCTIONS:	
WHERE INDICATED, ASSIGN A RATING FOR THE EMPLOYEE'S PERFORMANCE FOR EACH CATEGORY USING THE FOLLOWING GUIDELINES:	
Outstanding: Far exceeds requirements Very Good: Often exceeds requirements Satisfactory: Meet requirements Needs Improvement: Does not meet minimum job requirements	

REVIEW THE PERFORMANCE EVALUATION AND GOALS WITH THE EMPOYEE. THE COMPLETED PERFORMANCE EVALUATION IS TO BE SIGNED BY BOTH THE SUPERVISOR AND THE STAFF MEMBER. THE SIGNED AND COMPLETED FORM IS THEN TO BE REVIEWED AND SIGNED BY THE SUPERVISOR'S IMMEDIATE SUPERVISOR AND FORWARDED TO THE OFFICE OF HUMAN RESOURCES.

Not Acceptable

Unsatisfactory:

A Performance Evaluation 1. What is staff member's attendance record during last year? []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
2. Planning and Organization of Work Consider such variables as: Efficient use of time; timeliness of paperwork and statistical procedures, ability to establish priorities. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
3. Relationships with Other Staff Consider such variables as: Maintains positive relationships with clinical and nonclinical staff; is able to work together with others toward common goals; is able to work as part of a team; works effectively with community systems; participates in the interdisciplinary team process. []Outstanding []Very Good []Satisfactory []Needs Improvement [] Unsatisfactory Explain.
4. Initiative and Innovation Consider such variables as: self starts, takes responsibility, makes efforts in face of obstacles; offers suggestions, implements new sound ideas. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.

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	B. Supervision 1. Administrative Supervision Ability to delegate tasks, communicate objectives, and obtain timely compliance with agency and regulatory mandates. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
The state of the s	2. Clinical Supervision Ability to identify and evaluate learning needs of staff specifically related to special populations. Ensures that staff receives appropriate development, training, and supervision; level of knowledge and ability to communicate that knowledge. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain.
	3. Leadership Ability to inspire and motivate staff. Ability to develop and communicate new ideas. Presentation of workshops, papers, seminars, etc.,. Program development. []Outstanding
	4. Community Relations Council representation, special committees, intra-agency and interagency committees and

boards.

[]Outstanding
[]Very Good
[]Satisfactory
[]Needs Improvement
[]Unsatisfactory

Explain.

C. Quality Assessment and Improvement (QAI) Please indicate the staff member's participation in the following committee processes: QAI Monitoring and Evaluation; Utilization Review; Incident Investigation and Review; Safety Management; Infection Control.
Have any committee reports indicated problems with staff member's clinical practice? []Yes []No If yes, explain.
2. Has staff member served as a member of any of the committees listed above? []Yes []No If yes, explain.
D. Recognition of Work Performance 1. Has staff member received special recognition for exemplary performance during the past year? []Yes []No If yes, describe.
2. Has staff member been involved in disciplinary action during past year? []Yes []No If yes, explain
3. Have professional complaints been filed on staff member? []Yes []No If yes, has investigation found employee in compliance with agency standards? []Yes []No If no, explain
E. Staff Training 1. Has staff member served on Staff Training Committee? []Yes []No If yes, describe participation. If no, explain.

2. List courses staff member is still required to take:

3. List elective courses taken since last ev	aluation:			
4. Has staff member taught Agency course If yes, list:	es? []Yes	[]No		
5. Has staff member participated in out-of In what capacity? []Participant [] Le Explain.		?	[]Yes	[]N
6. Recommendations for further training				
F. Supervision Description of staff member's use of supermeetings and other clinical meetings with []Outstanding []Very Good []Satisfactory []Needs Improvement [] Unsatisfactory		tion, particip	ation in st	taff

GOALS

Progress in achieving mutually estal GOAL	PROGRESS	
		A Section of the second section of the section of the second section of the section of the second section of the
		- Andrew - A
		and the state of t
. State mutually established performa	nce goals for next evaluation	
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State mutually established performa	nce goals for next evaluation	
State mutually established performa	nce goals for next evaluation	
State mutually established performa	nce goals for next evaluation	
State mutually established performa	nce goals for next evaluation	

SIGNATURES

SUPERVISOR'S SIGNATAURE:	Date:
EMPLOYEE BEING EVALUATED:	
I have read this Performance Evaluation and have reviewe	d it with my supervisor(s).
(Note: Employee's signature indicates only that this performance Evaluation. Employee may provide a	ement with the contents of this
Employee's Signature	_ Date
Reviewed By	Date
Received By	Date
Office of Human Resources Signatu	ire

WESTCHESTER JEWISH COMMUNITY SERVICES, INC.

PERFORMANCE EVALUATION - CLINICAL STAFF

Practitioner's Name		•
Practitioner's Title		
Supervisor's Name & Title		-
TYPE OF EVALUATION [] INITIAL	[]PERIODIC	
EVALUATION DATES: FROM:	TO:	
PRACTITIONER'S DISCIPLINE:		
[]Case Management []Psychiatry []Nursing []Psychology []Other	[]Psycho-education / []Social Work	

INSTRUCTIONS/ROUTING:

COMPLETE THE SECTIONS THAT APPLY TO THE EMPLOYEE BEING EVALUATED AND REMOVE SECTIONS THAT ARE NOT RELEVANT.

ASSIGN A RATING FOR THE PRACTITIONER'S PERFORMANCE FOR EACH CATEGORY USING THE FOLLOWING GUIDELINES:

Outstanding:

Far exceeds requirements Often exceeds requirements

Very Good: Satisfactory:

Meets requirements

Needs Improvement: Does not meet minimum job requirements

Unsatisfactory:

Not Acceptable

REVIEW THE PERFORMANCE EVALUATION AND GOALS WITH THE EMPLOYEE. THE COMPLETED PERFORMANCE EVALUATION IS TO BE SIGNED BY BOTH THE SUPERVISOR AND THE STAFF MEMBER. THE SIGNED AND COMPLETED FORM IS THEN TO BE REVIEWED AND SIGNED BY THE SUPERVISOR'S IMMEDIATE SUPERVISOR AND FORWARDED TO THE OFFICE OF HUMAN RESOURCES.

SECTION I. GENERAL - FOR ALL CLINICAL STAFF SECTION VI. **PSYCHO-EDUCATION** SECTION II. CASE MANAGEMENT
SECTION III. NURSING
SECTION IV. PSYCHIATRY
SECTION V. PSYCHOLOGY INTERNIST/PRACTITIONER SECTION VII. SECTION VIII. **PHARMACOLOGY** SEXTION IX. DIETARY GOALS - FOR ALL CLINICAL STAFF SECTION X.

SECTION XI. SIGNATURES - FOR ALL CLI NICAL STAFF

SECTION I - GENERAL

A. Description of Individual's Caseload and Other Responsibilities (Include student supervision, teaching, etc.)
B. PERFORMANCE EVALUATION
What was practitioner's attendance record during last year? []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory Explain. Description Explain E
Productivity As determined in relation to specific program standards. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
3. Quality of Written Clinical Documentation A review of the employee's clinical records should indicate that they meet the standards established by the Agency and are in compliance with state and federal regulations. Consider such variables as: ability to write in a clear, concise, and appropriately detailed fashion. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
4. Planning and Organization of Work Consider such variables as: efficient use of time, timeliness of paperwork and statistical procedures, ability to establish priorities. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

SECTION I - GENERAL (CONT'D)

C. Relationships with Other Staff Consider such variables as: mainta together with others toward common	ins positive relation on goals, is able to v	vork as part of a team; v	
systems; participates in the interdis []Outstanding		ess. []Needs Improvement	ent []Unsatisfactory
D. Initiative and Innovation Consider such variables as: self sta	arts takes responsi	bility, makes efforts in fa	ace of obstacles: offers
suggestions, implements new soun []Outstanding []Very Good		•	
[]Outstanding []very Good	[]Salistaciony	[]Meeds improvem	lent []Onsatisfactory
E. Evaluation of Clinical Work1. Does practitioner deal with speci	al populations (be s	specific)?	
Child & Adolescent	Seriously i		Health Care
Mental Retardation/ Developmental DisabilitiesGeriatric	Addictive E Residentia Victims of I	i Care	Nursing Home Care

2. Description of practitioner's integration of theory and practice, knowledge related to populations. Include description of practitioner's level of practice in each treatment modality. Description of practitioner's level of practice in each treatment modality: Individual, family, group. Include a statement about goals for further development of skills. If practitioner is a supervisor of interns, describe the supervisory process.

USE PAGE 6 FOR NARRATIVE

SECTION I. - GENERAL (CONT'D)

F. Quality and Improvement (QI) Please indicate the practitioner's participation in the following committee processes: QI Monitoring and Evaluation; Utilization Review; Incident Investigation and Review; Safety Management; Infection Control
1. Have any of the above committee reports indicated problems with practitioner's clinical practice? []Yes []No If yes, explain.
G. Recognition of Work Performance 1. Has practitioner received special recognition for exemplary performance during the past year? []Yes []No If yes, describe.
Has practitioner been involved in disciplinary action during past year? []Yes []No If yes, explain
3. Have professional complaints been filed on practitioner? []Yes []No If yes, has investigation found employee in compliance with agency standards? []Yes []No If no, explain.

SECTION I. - GENERAL (CONT'D)

H. Staff Training 1. Has practitioner served on Staff Training Committee? []Yes []No If yes, describe participation. If no, explain.
2. List courses practitioner is still required to take:
4. Has practitioner taught Agency courses? []Yes []No If yes, list:
5. Has practitioner participated in out-of-agency training? []Yes []No In what capacity? []Participant [] Leader
6. Recommendations for further training:
 I. Supervision Description of practitioner's use of supervision, consultation, participation in staff meetings and other clinical meetings within the Agency. []Outstanding []Very Good []Satisfactory []Needs Improvement [] Unsatisfactory

EVALUATION OF CLINICAL WORK - NARRATIVE PAGE
Use for narrative of section E2 and additional information for SECTION I

SECTION II - CASE MANAGEMENT

A. Position Knowledge Ability to assess/identify consumer needs; ability to understand consumer wants and needs; able to establish a working relationship with consumer/family; ability to perform initial and ongoing social assessments; knows and applies principles and practices of case management; ability to use self purposefully and differentially with consumers and team members.
[]Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
B. Caseload Management Meets productivity standards; able to balance consumer caseload and set priorities according to consumer needs and program requirements; establishes initial and ongoing consumer centered case plans; identifies need for changes in level of care, service frequency and intensity; formulates discharge plan and follows through. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
C. Community Organization and Service Linkage Skills Demonstrates skill in consumer advocacy, i.e entitlement, social support systems, community resources, etc; utilizes other Agency services such as counseling, vocational testing, home care, psychological testing, etc. Designs and implements individualized care/ service plans with agreed upon goals for meeting consumer health/mental health/social service needs. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
D. Working Relations Works with difficult consumer situations and handles emergencies, i.e., accidents, complaints, etc. with minimum disruption of the service; maintains priorities while working through problem situations: selects, schedules and supervises appropriate formal caregivers, direct care and paraprofessionals; is a team player; works with other agencies/professionals in the community to accomplish the goals of the care/service plan. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

E . Leadership

Able to represent agency in the community; able to work towards mutual establishment of goals, coordinate services and establish follow-up plans; able to lead a team; carry out special assignments such as student supervision, family life education, seminar leader, administrative assignments, consultant to other agencies, community councils, committees and training sessions. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
SECTION III - NURSING
A. Assessment/Diagnostic Skills. Ability to collect information relevant to the diagnostic process; includes consumer/family choices in the assessment process; makes appropriate analysis of client health care problems using diagnostic test results, observation and interview; documents appropriate signs symptoms and nursing interventions resulting from the assessment process.
[]Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
B. Treatment Planning, Implementation, and Evaluation Skills Understands the rationale for treatment plans of care; able to establish and supervise a plan of care based upon appropriate assessment; able to implement appropriate treatment procedures during ongoing care and emergency situations; sets priorities based upon client's/family's response to treatment and the clinical situation. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
C. Education/Training Skills/Supervision Understands and communicates relevant health care and/or treatment information to consumer and/or staff; uses appropriate educational methods and resources; able to teach individuals and groups about health maintenance; disease and/or treatment processes. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
D. Employee Development Displays initiative and self-direction in dealing with consumers, families, care givers, and community. Able to develop, extend, or initiate new ideas and programs; understands personal potential and sets professional and personal goals. []Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory

E. Leadership

Able to represent agency in the community; to work towards mutual establishment of goals, coordinate services and establish follow-up plans; able to lead a team; and supervise home care aides and other workers. Carry out special assignments such as student supervision, family life education, seminar leader, administrative and committee assignments, consultant to other agencies, community councils.

[]Outstanding []Very Good []Satisfactory []Needs Improvement []Unsatisfactory
SECTION IV - PSYCHIATRY
DESCRIBE (Please use additional pages as needed):
A. CONSULTATION: Include discussion re availability to consultee; skills in grasping and integrating diverse issues; pertinence, clarity, and usefulness of consultations.
B. PATIENT EVALUATION : Include discussion of thoroughness, timeliness, and clarity and documentation of evaluation, capacity of psychiatrist to establish and maintain rapport with patients, usefulness of formulation and recommendations.
C. MEDICATION: Include discussion of care evaluating need for psychotropic meds. Appropriate follow-up including documentation thereof e.g. Li+ levels or AIMS testing. Include comments on efficacy with which psychiatrist conveys to therapist and patient and the part medication plays in overall treatment plan.

D. TEAM LEADERSHIP:

Include discussion of skill at informal and, where applicable, formal teaching or training; include availability to staff and roles psychiatrist plays as senior member of an interdisciplinary team.

E. EMERGENCIES:

Include discussion of psychiatrist's responsiveness in emergencies and of usefulness of those responses.

SECTION V - PSYCHOLOGICAL SERVICES

(TO BE COMPLETED BY PSYCHOLOGIST) Description of practitioner's performance in the following areas:		
A. Administration, evaluation, and writing of psychological test reports. []Outstanding []Very Good []Satisfactory []Needs Improvemer	ıt []Unsatisfactory
B. Timeliness in administering and writing tests. []Outstanding []Very Good []Satisfactory []Needs Improvemer	nt []Unsatisfactory
C. Participation in diagnostic conferences. []Outstanding []Very Good []Satisfactory []Needs Improvemer	nt []Unsatisfactory
D. Feedback of psychological testing to staff/consumers. []Outstanding []Very Good []Satisfactory []Needs Improvemer	nt []Unsatisfactory
E. Supervision of psychology interns. []Outstanding []Very Good []Satisfactory []Needs Improvemer	nt []Unsatisfactory
F. Participation in research studies. []Outstanding []Very Good []Satisfactory []Needs Improvement	nt []Unsatisfactory

SECTION VI - PSYCHOEDUCATIONAL SERVICES

De	escription of prac	titioner's perforn	nan	ce in the follow	ıng	areas:		
						educational test repol]Needs Improvement]Unsatisfactory
	Timeliness in a				[]Needs Improvement	[]Unsatisfactory
	Participation in]Outstanding [-			[]Needs Improvement	[]Unsatisfactory
	. Feedback of ps]Outstanding [onsumers]Needs Improvement]]Unsatisfactory

SECTION VII - INTERNIST/PRACTITIONER

A. CONSULTATION:

Include discussion regarding availability to consultee; skills in grasping and integrating diverse issues; and the pertinence, clarity, and usefulness of consultations.

B. PATIENT EVALUATION

Include discussion of thoroughness, timeliness, clarity, and content of physician's health database. Include a brief review of internist's/practitioner's capability in establishing and maintaining rapport with patients, including usefulness of formulation and recommendations.

C. MEDICATION

Include discussion of thoroughness in delineating the patient medication regimen. Comment on the appropriateness of follow-up, including requisition and documentation thereof (e.g. K+, Dilantin, Digoxin, etc., levels.) Include comments on the efficacy with which internist/practitioner conveys information to other members of the health care team and patient, and the part medication plays in overall treatment plan.

D. TEAM LEADERSHIP

Include discussion of skill at informal and, where applicable, formal teaching or training sessions. Include availability to staff and the role the internist/practitioner plays as a senior member of an interdisciplinary team.

E. EMERGENCIES

Include discussion of internist/practitioner responsiveness in emergencies and of usefulness of those responses.

SECTION VIII - PHARMACOLOGY

A. CONSULTATION

Include discussion regarding availability to consult; skills in grasping and integrating diverse issues, and the pertinence, clarity, and usefulness of consultations.

B. PATIENT EVALUATION

Include discussion of thoroughness, timeliness, clarity, and content of pharmacist health database. Include a brief review of pharmacist's capability in establishing and maintaining rapport with staff including usefulness of formulations and recommendations.

C. MEDICATION

Include discussion of thoroughness in delineating the patient medication regimen. Comment on the appropriateness of follow-up, including requisition and documentation thereof (e.g. K+, Dilantin, Digoxin, etc. levels). Include comments on the efficacy with which pharmacist conveys information to the members of the health care team and patient, and the part medication plays in overall treatment plan.

D. TEAM INVOLVEMENT

Include discussion of skill at informal and, where applicable, formal teaching or training sessions. Include availability to staff and the role the pharmacist plays as senior member of an interdisciplinary team.

E. EMERGENCIES

Include discussion of pharmacist's responsiveness in emergencies and of usefulness of those responses.

SECTION IX - DIETETICS

A. CONSULTATION

Include discussion regarding the availability to consultee; skills in integrating diverse issues, and the pertinence, clarity and usefulness of consultations.

B. CONSUMER EVALUATION

Include discussion of thoroughness, timeliness, clarity, and content of dieticians' annual nutritional database. Include a brief review of dietician's capability in establishing and maintaining rapport with consumers, including usefulness of formulations and recommendations.

C. DRUG-NUTRIENT INTERACTIONS

Include discussion of completeness in delineating the consumers' nutritional regimen. Comment on the appropriateness of follow-up, including requisition and documentation thereof, ease with which dietician conveys information to other members of health care team and consumer, and the role played in the overall treatment plan.

D. TEAM PARTICIPATION

Include discussion of skill at informal, and, where applicable, formal teaching or training sessions. Include availability to staff and the role the dietician played as a member of an interdisciplinary team.

E. AVAILABILITY

Include discussion of dieticians' responsiveness in emergencies and of usefulness of information obtained.

SECTION X - GOALS

A. Progress in Achieving Mutually established goals:	
GOAL	PROGRESS
B. State mutually established performance goals for n	ext evaluation:

SECTION XI - SIGNATURES

SUPERVISOR'S SIGNATURE:	Date:
PRACTITIONER BEING APPRAISED:	
I have read this Performance Evaluation and have re	viewed it with my supervisor(s).
(Note: Practitioner's signature indicates only that this Practitioner's signature does not signify agreement w Practitioner may provide a written response.	
Practitioner's Signature:	Date
Reviewed By:	Date
Received By:	Date

Instructions:

Effective evaluation of job performance is an on-going process. Annually each manager or supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used for annual evaluations, and at other times during the year when formal feedback is needed.

These forms have been approved for employees covered by the Personnel Policies for Staff Members (PPSM) for the 2008 cycle. For represented employees, departments will want to use forms that have been approved by the respective bargaining units.

Part I - Job Success Factors

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above. The factors include knowledge and skills specific to this position (Part 1-A), and competencies common to the campus professional job standards (Part 1-B).

Part II - Goals from last year or last evaluation period

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Goals for this coming year or evaluation period

Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those of the department and the campus.

Part IV - Professional Development Plan

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

Lovel E (E)	Rating Scale*:
Level 5 (E)	Exceptional Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of unit, department, or University objectives. This rating is achievable by any employee though given infrequently.
Level 4 (EE)	Exceeds expectations Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.
Level 3 (ME)	Meets expectations Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.
Level 2 (I)	Improvement needed Performance did not <i>consistently</i> meet expectations – performance failed to meet expectations in one or more <i>essential</i> areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section 4, including timelines, and monitored to measure progress.
Level 1 (U)	Unsatisfactory Performance was consistently below expectations in most <i>essential</i> areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. In Section 4, a plan to correct performance, including timelines, must be outlined and monitored to measure progress.
	*The inclusion of goals is typically a consideration in assessing the overall rating.

Performance evaluation and planning form Professional Employee: Job Title: Department: Control Unit: Evaluation Period: From Annual Other to Appointment: Limited, end date: Career Probationary period ends: Part I. Job Success Factors **Factors** Comments (bold or underline to select) A. KNOWLEDGE and SKILLS SPECIFIC TO THIS JOB Demonstrates the essential functions, knowledge and skills articulated in the job description ME ΕE (may give a global rating OR insert here essential functions as listed in the job description, include them by reference in an attached copy of the job description, or paraphrase from the job description) B. PROFESSIONAL COMPETENCIES Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and U MF EΕ Ε their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others 2. Stewardship Demonstrates accountability and sound judgment in using university resources in open and effective manner, appropriate understanding of MF EE confidentiality, university values; adheres to policies, procedures, and safety U E quidelines 3. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new U ME EE F challenges 4. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all U ME EE Ε 1 decision making; distinguishes relevant from irrelevant information and makes timely decisions 5. Strategic planning and organizing Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to change as needed, evaluates alternatives, U ME EE Ε solutions oriented, seeks alternatives and broad input; can see connections within complex issues Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written U ΜE ΕE Ε 1 communication skills 7. Quality improvement Strives for efficient, effective, high quality performance in self and the unit; H ΜE ΕE E delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements 8. Leadership Accepts responsibility for own work; develops trust and credibility; U ME EE Ε demonstrates honest and ethical behavior

UC Berkeley

UC Berkeley Performance evaluation and planning form						Professional			
Employee:Job Title:Department:									
Control Unit:totoAnnu Appointment : Limited, end date: Career	nualOther Probationary period					l ends:			
PROFESSIONAL COMPETENCIES, continued					-				
9. Teamwork Cooperates and collaborates with colleagues as appropriate; works in partnership with others •	U	1	ME	EE	E				
10. Service focus Values the importance of delivering high quality service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided	U	ı	ME	EE	Е				
11. Unit or department specific competency (optional)	U	1	ME	EE	E				
Rate the progress made on each of the goals established at the modifications to the original goals. Goal	e beg	ginni	ng of th		iod a	nd any new goals. Note any Comments			
1.	U		ME	EE	Е				
2.	U	1	ME	EE	E				
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4.	U	ļ	ME	EE	E				
5.	U	1	ME	EE	Е				

Performance evaluation and planning form	Professional
Employee: Job Title: Depa	rtment:
Control Unit: to Annual Other	
Appointment: Limited, end date: Career Probationary	
	TOTAL MARKETS COLUMNIAN MARKETS CONTRACTOR AND
Part III. Next Period's Goals Enter the performance goals for the next period to be evaluated. Individual goals an	d objectives should align with
those of the department and the campus.	a objective directed differential
1.	
Measure of success: 2.	
2.	
Measure of success:	
3.	
Measure of success:	
4.	
Measure of success:	
5.	
Measure of success:	
Progress toward meeting these goals will be reviewed at the time of the nex	vt avaluation
Progress toward meeting these goals will be reviewed at the time of the re-	Rt Evaluation.
Part IV. Professional Development P	lan
Signatures: Employee: Date:	
Employee: Date:	٦.
I would like to include comments from my self assessment.	
Manager/supervisor: Name:	
Manager/supervisor: Name: Date:	
Department manager: Name: Date	and the same of th
The employee being evaluated is to receive a copy of the compared in the personner.	

UC Berkeley

Performance evaluation and planning form Operational/technical Employee: Job Title: Department: Control Unit: Other

Probationary period ends:

Instructions:

Career

Effective evaluation of job performance is an on-going process. Annually each manager or supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used for annual evaluations, and at other times during the year when formal feedback is needed.

These forms have been approved for employees covered by the Personnel Policies for Staff Members (PPSM) for the 2008 cycle. For represented employees, departments will want to use forms that have been approved by the respective bargaining units.

Part I - Job Success Factors

Appointment: Limited, end date:

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above. The factors include knowledge and skills specific to this position (Part 1-A), and competencies common to the campus operational/technical job standards (Part 1-B).

Part II - Goals from last year or last evaluation period

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Goals for this coming year or evaluation period

Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those of the department and the campus.

Part IV - Professional Development Plan

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

	Rating Scale*:
Level 5 (E)	Exceptional
	Performance far exceeded expectations due to exce
	- H

Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of unit, department, or University objectives. This rating is achievable by any employee though given infrequently.

Level 4 (EE) Exceeds expectations

Performance consistently exceeded expectations in all *essential* areas of responsibility, and the quality of work overall was excellent. Annual goals were met.

Level 3 (ME) Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

Level 2 (I) Improvement needed

Performance did not *consistently* meet expectations – performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section 4, including timelines, and monitored to measure progress.

Level 1 (U) Unsatisfactory

Performance was consistently below expectations in most *essential* areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. In Section 4, a plan to correct performance, including timelines, must be outlined and monitored to measure progress.

*The inclusion of goals is typically a consideration in assessing the overall rating.

Performance evaluation and planning form Operational/technical Employee: Job Title: Department: Control Unit: Evaluation Period: From Annual Other to Appointment: Limited, end date: Career Probationary period ends: Part I. Job Success Factors **Factors** Comments (bold or underline to select) A. KNOWLEDGE and SKILLS SPECIFIC TO THIS JOB Demonstrates the essential functions, knowledge and skills articulated in the job description ME ΕE Ε (may insert here essential functions from the job description, include by reference and attach a copy, or add language from it here) B. OPERATIONAL/TECHNICAL COMPETENCIES Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and U ME EΕ E their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others 2. Stewardship Demonstrates accountability and sound judgment in using university resources in open and effective manner, appropriate understanding of ME U ΕE E confidentiality, university values; adheres to policies, procedures, and safety guidelines 3. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new U MΕ EΕ Ε challenges 4. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all U ME EE Ε decision making, distinguishes relevant from irrelevant information and makes timely decisions 5. Planning and organizing Achieves unit's plans within timelines and resources; scopes, plans and schedules work; sets priorities and goals; anticipates and adjusts for 1 1 MF EĘ problems; evaluates workloads; measures and evaluates performance Ε against goals. 6. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written U ME EΕ Ε communication skills 7. Quality improvement Strives for efficient, effective, high quality performance; delivers timely and ME EΕ Ε accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements 8. Leadership Accepts responsibility for own work; develops trust and credibility; U ME Ε demonstrates honest and ethical behavior ΕE

UC Berkeley

						Operational/technical	
Control Unit:	Performance evaluation and planning form Employee:						
Control Onit.							
Evaluation Period: From to An Appointment: Limited, end date: Career	nual _		robation	other_		d ends:	
Appointment . Limited, end date. Career			TODATIO	laly k	CHO	a citas.	
OPERATIONAL/TECHNICAL COMPETENCIES, continued							
9. Teamwork Cooperates and collaborates with colleagues as appropriate; works in partnership with others	U	ı	ME	EE	E		
10. Service focus Values the importance of delivering high quality service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided	U	ı	ME	EE	E		
11. Unit or department specific competency (optional)	U	ı	ME	EE	E		
modifications to the original goals. Goal			Ratin				
		T	RACIII	9	T	Comments	
1.	U		ME	g EE	E	Comments	
1. 2.	U	ı		1	E	Comments	
		1	ME	EE		Comments	
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2. 3. 4.	U		ME ME ME	EE EE EE	E	Comments	

Performance evaluation and	planning f	orm	Oper	ational/technical
Employee:	_ Job Title: _		Department:	Money Waller
Control Unit: From	 to	Annual	Other	
Appointment : Limited, end date:	10	Career	Probationary period ends	
Enter the performance goals for the n those of the department and the camp	ext period to b	Next Period' be evaluated. Ind		should align with
1.				
Measure of success:				
2.				
Measure of success:				
3.				
Measure of success:				
4.				
Measure of success:	WIII - 20 - 20 - 20 - 20 - 20 - 20 - 20 -			
5.				
Measure of success:				
Progress toward meeting these go	oals will be re	eviewed at the	time of the next evaluatio	n.
Part I	V. Profes	sional Deve	elopment Plan	
Signatures:				
Employee:		7.72	Date:	
My signature indicates tha I would like to include	at I have rece comments f	eived a copy of from my self as	this evaluation. sessment.	
Manager/supervisor: Na	ame			
Signature: _			Date:	
Department Manager: N	lame			

The employee being evaluated is to receive a copy of the completed evaluation form and one copy shall be placed in the personnel file.

UC Berkeley Performance evaluation and planning form Supervisor/Manager Employee: Job Title: Department: Control Unit: Evaluation Period: From to Annual Other Appointment: Limited, end date: Career Probationary period ends:

Instructions:

Effective evaluation of job performance is an on-going process. Annually each manager or supervisor provides a summary of progress toward meeting job expectations and last year's goals. This form is to be used for annual evaluations, and at other times during the year when formal feedback is needed.

Part I - Job Success Factors

These include knowledge, skills and basic competencies. Rate each factor based on performance during the period identified above. The factors include knowledge and skills specific to this position (Part 1-A), and competencies common to the campus supervisor/manager job standards (Part 1-B).

Part II - Goals from last year or last evaluation period

Rate the progress made on each of the goals established at the beginning of the period. Also include any new goals established during the evaluation period and note any modifications to the original goals.

Part III - Goals for this coming year or evaluation period

Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those of the department and the campus.

Part IV - Professional Development Plan

Enter any actions that will be taken by the employee or manager to support the goals indicated in Part III above, or specific job success factors in Part I. The plan may include career growth, job mastery, or actions to correct performance.

Rating Scale*:

Level 5 (E) Exceptional

Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of unit, department, or University objectives. This rating is achievable by any employee though given infrequently.

Level 4 (EE) Exceeds expectations

Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.

Level 3 (ME) Meets expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.

Level 2 (I) Improvement needed

Performance did not *consistently* meet expectations – performance failed to meet expectations in one or more *essential* areas of responsibility, and/or one or more of the most critical goals were not met. A professional development plan to improve performance must be outlined in Section 4, including timelines, and monitored to measure progress.

Level 1 (U) Unsatisfactory

Performance was consistently below expectations in most *essential* areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. In Section 4, a plan to correct performance, including timelines, must be outlined and monitored to measure progress.

*The inclusion of goals is typically a consideration in assessing the overall rating.

	UC Berkeley Performance evaluat	ion and nlanning	Supervisor/Manager									
	Employee:				-							
	Control Unit:											
	Evaluation Period: From to Annual Appointment: Limited, end date: Career						OtherProbationary period ends:					
Appointment. Emiliou, one dato. Odroot 1 tobattorially police ords.												
Part I. Job Success Factors												
	Factors		,	'i I -		Rating		1	Comments			
A KNO	OWLEDGE and SKILLS	SPECIFIC TO THIS		DOIG	or	underli T	ne to	sei	ect)			
	trates the essential functions, k											
е	(may give a global rating OR listed in the job description, ir attached copy of the job desc description)	clude them by reference	to an	U	1	ME	EE	E				
B. SU	PERVISOR/MANAGER	COMPETENCIES										
Promote their diffe	nclusiveness s cooperation, fairness and equerences; works to understand p ; brings out the best in others			U		ME	EE	E				
Coaches recogniz	Managing people , evaluates, develops, inspires es achievements, manages cor y goals, provides feedback, gro	nflict, aligns performance	goals with	U	Table 1	ME	EE	Е				
Demons! resource	Stewardship and mana crates accountability and sound s in open and effective manner tiality, university values; adhere s	judgment in managing u , appropriate understand	ling of	U	in the second se	ME	EE	Е				
Identifies	Problem solving problems, involves others in sate analyses, searches for best	eeking solutions, conduc solutions; responds qui	ts ckly to new	U		ME	EE	Е				
decision	Decision making ear, consistent, transparent de making; distinguishes relevant mely decisions			U	-	ME	EE	E				
outcome solutions within co	Strategic planning and inds big picture and aligns prior s, uses feedback to redirect as oriented, seeks alternatives ar mplex issues	ities with broader goals, needed, evaluates alterr	natives,	U		ME	EE	E				
Connects and effect	ommunication s with peers, subordinates and ctively shares information, dem ication skills, negotiates effective	onstrates effective oral a		U		ME	EE	E				
Strives for delivers for	Quality improvement or efficient, effective, high qualit imely and accurate results; res not going well; takes initiative to	ilient when responding to		U	l	ME	ĒĒ	E				
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UC Berkeley Performance evaluation and planning form						Supervisor/Manager
Employee: Job Title: Departmer					men	
Control Unit:						
Evaluation Period: From to Annu Appointment: Limited, end date: Career	uai _	F	robation	ther_ narv p		ends:
	and the same of	at A welcomb	THE PERSON NAMED AND ADDRESS OF THE PERSON NAMED AND ADDRESS O		orandoral territorio	
SUPERVISOR/MANAGER COMPETENCIES, continued						
9. Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others	U	ı	ME	EE	E	
10. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible	U	ı	ME	EE	Е	
11. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided	U	ı	ME	EE	Е	
12. Unit or department specific competency (optional)	U	ŀ	ME	EE	E	
Part II. Last Per Rate the progress made on each of the goals established at th modifications to the original goals. Goal				·	iod a	nd any new goals. Note any Comments
1.	U	ı	ME	EE	E	
2.	U	ı	ME	EE	E	
3.	U	1	ME	EE	E	
4.	U	1	ME	EE	E	
5.	U	1	ME	EE	E	
OVERALL RATING (based on Parts I and II) Relative weights of job success factors and performance goals are determined by the manager or supervisor. Higher priority items may be highlighted.		T T T T T T T T T T T T T T T T T T T	ME	EE	E	

UC Berkeley Performance evaluation and planning form Supervisor/Manager Job Title: Department: Employee: Control Unit: to _____ Annual ___ Career ____ Evaluation Period: From Other Probationary period ends: Appointment: Limited, end date: Enter the performance goals for the next period to be evaluated. Individual goals and objectives should align with those of the department and the campus. Measure of success: Progress toward meeting these goals will be reviewed at the time of the next evaluation. Part IV. Professional Development Plan Signatures: Employee: _ Date: My signature indicates that I have received a copy of this evaluation. ___ I would like to include comments from my self assessment. Manager/supervisor: Name:_____ Date: Signature: Department manager: Name: Date: Signature: _____ The employee being evaluated is to receive a copy of the completed evaluation form and one copy shall be placed in the personnel file.

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Employee Self-Assessment Worksheet (optional)

Name:	Division/Dep	ot:		
Job Title:		Evaluation period		
Supervisor:		begin date: Evaluation period end date:		
Employee signature:		Date:		
Check here if you would like this W	Vorksheet to be included in your Performa	nce Evaluation and y	our personnel file.	
	evaluation is an interactive proce our supervisor. Please provide yo ob success factors.			
Part II. Goals: Provide an assessment of your period.	success in reaching the goals se	t at the beginning	g of the last evaluation	
			<u>ali aga jaraha da dan da da mana ada da d</u>	
	goals and development plan ke your supervisor to consider. In levant to achieving these goals an			
Comments: List any topics, issues, or proble	em areas that you wish to discuss	with your superv	risor during your review.	

Management Competency		To what degree does our leadership team as a whole demonstrate this competency?		e e	n d	nan lepa lem om;	oth age our ortm ons this	ner rs in ent trat	n s e		
1. Inclusiveness Promotes cooperation, fairness and equity; shows respect for people and their differences; works to understand perspectives of others; demonstrates empathy; brings out the best in others		1	2	3	4	5	1	2	3	4	5
2. Managing people Coaches, evaluates, develops, inspires people; sets expectations, recognizes achievements, manages conflict, aligns performance goals with university goals, provides feedback, group leadership; delegates		1	2	3	4	5	1	2	3	4	5
3. Stewardship and managing resources Demonstrates accountability and sound judgment in managing university resources in open and effective manner, appropriate understanding of confidentiality, university values; adheres to policies, procedures, and safety guidelines		1	2	3	4	5	1	2	3	4	5
4. Problem solving Identifies problems, involves others in seeking solutions, conducts appropriate analyses, searches for best solutions; responds quickly to new challenges		1	2	3	4	5	1	2	3	4	5
5. Decision making Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions		1	2	3	4	5	1	2	3	4	5
6. Strategic planning and organizing Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to redirect as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; can see connections within complex issues		1	2	3	4	5	1	2	3	4	5
7. Communication Connects with peers, subordinates and customers, actively listens, clearly and effectively shares information, demonstrates effective oral and written communication skills, negotiates effectively		1	2	3	4	5	1	2	3	4	5
8. Quality improvement Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvements		1	2	3	4	5	1	2	3	4	5
 Leadership Motivates others, accepts responsibility; demonstrates high level of political acumen; develops trust and credibility; expects honest and ethical behavior of self and others 		1	2	3	4	5	1	2	3	4	5
10. Teamwork Encourages cooperation and collaboration; builds effective teams; works in partnership with others; is flexible		1	2	3	4	5	1	2	3	4	5
11. Service focus Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; shares accountability for results provided		1	2	3	4	5	1	2	3	4	5

- 5 We are a model in this area of competency
 4 We are better than most in this area
 3 We are usually successful in this area
 2 We could use development in this area
 1 We need substantial improvement in this area



RADY CHILDREN'S HOSPITAL – SAN DIEGO PERFORMANCE EVALUATION FEEDBACK FORM WITH RATING SCALE FISCAL YEAR 07/08

Employee Name:	Employee Number:
Employee Job Title:	

Please read the competency definition and indicate which rating level best describes the employee being evaluated.

1. Customer Service/CARES - Practices Children's Customer Service Behavior Standards (CARES Model) - Collaborative: Collaboration and teamwork - combining effort, mutual respect, open and honest communication, sharing of responsibilities and the willingness to work together in a fair and equitable manner resulting in achievement of common goals. Accountable: Willing to accept individual responsibility by being responsive, taking initiative, following through and working efficiently and ethically. Respectful: Embracing individual differences by showing regard for the privacy of our patients and acceptance of the values, cultures and beliefs of our patients and co-workers that allows us to care for a diverse community. Excellent: Expecting the best of oneself and others. Having high energy, a positive attitude with a can-do spirit resulting in a healthy environment. Safe: Maintains a safe work environment by considering the design, equipment and processes needed to achieve the lowest risk of injury and error.

NEEDS DEVELOPMENT	PROFICIENT		OU.	TSTANDING
Customer Service Behavior Standards are inconsistently exhibited. Often unwilling to handle criticism, complaints, specific requests. Doesn't consistently listen well and may be overwhelmed or defensive. Makes exceptions that create problems. Communicates well with some, not well with others. Doesn't regularly communicate proactively.	Embraces change. Wor together as a team. Pro receives feedback to an others in an open and remanner. Seeks solution than blame. Follows thr completion. Presents a and professional image. privacy. Complies ethic Children's Code of Conc Communicates in a polit positive manner. Listent Offers assistance directly one's scope of practice. family-centered care. Vochildren's team. Takes do things right. Ascertain implements and follows practices. Continually in Learns and follows safet guidelines. Reports unsaconditions immediately. Children's environment relean.	vides and d from espectful as rather ough to positive Protects ally with duct. e and s to learn. y within Provides alues the time to ins, best inproves. Ey afe Keeps	customer ser Customer Se Standards. A workers in m Service Beha Customer for on projects a Assertively a the extra mile customers.	nd creatively goes e to please Anticipates customer xpectations to
Consistently Does Not Meet	Meets <u>All</u> Performance	Meets and Perform		Consistently Exceeds All
Expectations	Expectations on a	Expecta		Performance
	regular basis	majority o		Expectations
1	2	2.		3
]	

2. Clinical/Technical/Business Skill - Possesses the clinical/technical and/or business knowledge and skills to do the job at a high level of accomplishment: applies skills effectively; picks up and learns new skills quickly; keeps up with new technology; demonstrates interest in and accountability to the functions of the job.

NEEDS DEVELOPMENT	PROFICIENT		OUTS	TANDING	
Resists learning new skills. Stuck	Quickly picks up and ap		Applies knowledge toward		
in past practices and/or	skills. Develops and /or keeps improving on-			oing systems and	
technologies. Fails to	up with new practices ar			lunteers to present	
demonstrate new skills. Does not			new information		
complete required training.			Volunteers to le		
Does not display required skills to	done in an efficient man			nologies and/or	
accomplish the job.	Displays the necessary	the necessary skills to		co-workers to	
	perform proficiently.			otor/technical skills.	
	Meets All	Meets and	THE RESTAURANT OF THE PARTY OF	Consistently	
Consistently Does Not Meet	Performance	Perfor		Exceeds All	
Expectations	Expectations on a	Expecta		Performance	
	regular basis	majority o	f the time	Expectations	
1	2	2.	5	3	
- E					

3. Quality/Process Improvement - Comes up with new and innovative ideas; concentrates efforts on important priorities; focuses on patient and employee safety as a personal and organizational priority; sets goals and objectives; breaks down complex processes into simple steps; is dedicated and accountable to providing highest quality services and is committed to continuous improvement as it relates to both job duties/work processes and departmental/organizational financial stability. Strives to maintain a safe working environment for their self and others.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Uses past/familiar practices. Doesn't work to simplify things. Doesn't participate in improvement processes. Consistently identifies problems without offering solutions. Is not appropriately aware of revenue process improvement efforts and recommendations and decisions routinely do not correspond with these efforts. Does not routinely work within the established safety guidelines for their position.	Plans, organizes, and sets goals and objectives according to quality standards. Considers new ideas and solutions. Clearly defines problem before taking action to resolve. Identifies solutions to problems, and implements the solution. Assists with establishing, monitoring, and measuring team performance and safety standards and goals. Has a basic understanding of revenue process improvement efforts and routinely makes recommendations and decisions with these efforts in mind. Is aware of workplace safety requirements and works within these guidelines.	Frequently a pro-active contributor of original ideas and/or process improvement suggestions. Establishes a system for monitoring quality or improvement. Leads performance improvement initiatives and shares with other work areas. Educates co-workers in quality and productivity improvement principles. Has a solid understanding of revenue process improvement efforts and performs in a manner consistent with these efforts. Is dedicated to workplace safety and consistently maintains safe working conditions for self and others.
Consistently Does Not Meet Expectations	Meets All Meets and Performance Perfor Expectations on a Expecta regular basis majority of	Exceeds Consistently

4. Team Relationships - Seen as cooperative and a team player, easily gains trust and support of peers; encourages collaboration; finds common ground; offers candid feedback to peers.

NEEDS DEVELOPMENT	PROFICIENT		OUT	STANDING	
Doesn't understand team	Understands and values th	s and values the		ick on own ideas.	
expectations or needs. Not open	nature of teams. Uses wir	ı-win	Takes leadership role in team		
to negotiation with peers. May	solutions to resolve conflic	t.	activities/proje	ects. Mentors direct,	
reject team decision-making	Communicates with peers	with	appropriate		
processes. Doesn't have skills or	direct, appropriate and tim	ely	communicatio	n/feedback process	
interest to participate as a team	feedback. Informs team m	nembers	to peers. Use	es active listening	
member. Disruptive to team effort.				ites team meetings,	
Does not meet department	and suggests ways to improve			eam development.	
standard for meeting attendance	team performance. Demonstrates			ner staff to improve.	
or team participation.	flexibility, readily adapting to				
	changing needs of team.				
	active listening skills.				
		leets and	Exceeds	Consistently	
Consistently Does Not Meet	Performance	Performance		Exceeds All	
Expectations	Expectations on a	Expecta	itions a	Performance	
	regular basis n	majority of the time		Expectations	
1	2	2.	5	3	

5. Safety - Responsible for adhering to RCHSD guidelines and policies regarding safety. Maintains a safe work environment. Exhibits work-safe practices in all actions and behaviors.

NEEDS DEVELOPMENT	PROFICIENT		OUT	STANDING
Does not routinely work within the established safety guidelines for their position. Does not wear appropriate personal protective equipment.	Adheres to safety standard guidelines. Encourages among peers and patient Wears appropriate person protective equipment who required. Attends safety sessions. Reports all unsituations.	safety t families. onal en training	afety consistently maintains working conditions for others. Takes an active mentoring other emploaining safety guidelines. Fred	
Consistently Does Not Meet Expectations	Meets <u>All</u> Performance Expectations on a regular basis 2	Meets and Exceeds Performance Expectations a majority of the time 2.5		Consistently Exceeds All Performance Expectations

focused on goals and holds self				
Employees are asked to establito accomplish each goal. Goals bound.				
List 2007/2008 Goals (as identif	fied during the last perfo	ormance evalu	ation). If new	hire, indicate N/A:
1				
2				
3				
NEEDS DEVELOPMENT	PROFICIEN	ĮT		TSTANDING
Has failed to set or work towards goals. Did not achieve goals.	Has set and achieved not all goals established		goals. In ad	ed all established dition, has identified working towards
Does not <u>consistently</u> meet Performance Expectations	Meets <u>All</u> Performance Expectations on a regular basis	Meets and Perfori Expecta majority o	mance ations a	Consistently Exceeds All Performance Expectations
4	2	2.		
1 FY 2008/2009 Goals. To be estable				ee and leader – these
	lished with mutual ago o score the Goal Achi must be linked to the	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used the Performance Evaluation). Goals in	lished with mutual ago o score the Goal Achi must be linked to the	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used the Performance Evaluation). Goals a goals, as indicated in the organization	lished with mutual ago o score the Goal Achi must be linked to the	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used to Performance Evaluation). Goals a goals, as indicated in the organization.	lished with mutual ago o score the Goal Achi must be linked to the	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used to Performance Evaluation). Goals a goals, as indicated in the organization. Link to Department Specific Goal:	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establiate the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal:	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used to Performance Evaluation). Goals a goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: 2.	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be estable are the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: 2. Link to Department Specific Goal:	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establare the goals which will be used to Performance Evaluation). Goals a goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: 2.	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establiant the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: 2. Link to Department Specific Goal: OR	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establiant the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: 2. Link to Department Specific Goal: OR	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be establiance the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: OR Link to Department Specific Goal: OR Link to Organizational Goal:	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009
FY 2008/2009 Goals. To be estable are the goals which will be used to Performance Evaluation). Goals it goals, as indicated in the organization. 1. Link to Department Specific Goal: OR Link to Organizational Goal: OR Link to Department Specific Goal: 2. Link to Department Specific Goal: OR Link to Organizational Goal: 3.	lished with mutual agrossore the Goal Achimust be linked to the ation's Operating Plan	reement betw evement com overall depar	een employe	ee and leader – these the 2009

Please provide comments, including specific examples, to support your assessment of this employee's performance this past year.

EXAMPLES MUST BE TIED TO SPECIFIC JOB FUNCTIONS AS DESCRIBED IN THE EMPLOYEE'S JOB DESCRIPTION.

Performance Comments:

Recommendations For Growth:

EVALUATION SCORING MATRIX

Multiply each performance criteria composite score by the weight % to obtain the weighted score for each criterion. Add the weighted score for each performance criteria together for a total score that will range between 100 and 300.

Weighte	d%	Performance Criteria (1, 2, 2.5 or 3)		Weighted Score		
20%	Х		=			
20%	X		=			
20%	X		=			
20%	Х		=			
10%	X		=			
10%	X		=			
100%				(add all)		
	20% 20% 20% 20% 10%	20% X 20% X 20% X 10% X 10% X	(1, 2, 2.5 or 3) 20% X 20% X 20% X 20% X 10% X 10% X	(1, 2, 2.5 or 3) 20% X = 20% X = 20% X = 10% X = 10% X = 10% X =		

- *All employees not meeting standard (200+) will be placed on a 90-day Performance Improvement Plan. If an employee receives a score below standard it is expected that they have received prior counseling for failing to meet ongoing performance expectations.
 - (a) <u>Non-union employees</u>: At the end of the 90-day period, if the plan goals are met, the employee will be scheduled for final review 90-days later. At the time of the final review, if the employee is still meeting minimum standards for performance, an increase may be given only after Vice-President approval. This increase will not be retroactive.
 - (b) <u>SEIU represented employees</u>: Per the collective bargaining agreement, to be eligible for this increase, "an employee must have received an overall rating of "proficient" or better on his or her most recent performance evaluation and must not be on a performance improvement plan". A score of below 200 points will result in no increase.
 - (c) <u>UNOCH represented employees</u>: Per the collective bargaining agreement, employees receiving a below standard score on their performance evaluation will be placed on a performance improvement plan and may be eligible for the increase at the time of successful completion of the plan. This increase will not be retroactive.

Employee Comments:	
the position have been successfully met du	Employee acknowledge that either all competencies for ring this review cycle, July 1, 2007-June 30, 2008 or the Improvement Plan and is working towards successfully
Employee Signature	Reviewer Signature
Employee (Print)	Reviewer (Print)
Date	Date

ATTACH THIS FORM TO THE EVALUATION ONLY IF EMPLOYEE HAS RECEIVED DISCIPLINE

Please list any disciplinary actions taken <u>during the review period</u>, along with the current status.

Action #1
Date received:
Briefly describe the nature of the discipline: Choose the level of discipline received: < <choose one="">> Was employee placed on a Performance Improvement Plan? Yes No What is the current status of this disciplinary action? <<choose one="">> If "Other", please explain:</choose></choose>
Action #2
Date received:
Briefly describe the nature of the discipline: Choose the level of discipline received: < <choose one="">> Was employee placed on a Performance Improvement Plan?</choose>
☐ Yes ☐ No What is the current status of this disciplinary action? < <choose one="">></choose>
If "Other", please explain:
Action #3
Date received:
Briefly describe the nature of the discipline: Choose the level of discipline received: < <choose one="">> Was employee placed on a Performance Improvement Plan?</choose>
☐ Yes ☐ No What is the current status of this disciplinary action? < <choose one="">></choose>
If "Other", please explain:



Employee Self or Peer Evaluation Form Review Period: July 1, 2007 – June 30, 2008

Emp	loyee Name:	Employee Department:					
Revi	Reviewing Completed By:						
	0						
	Employee Self-Evaluation		Peer Feedback				
	se provide comments, including one or to	wo specific examp	les, to support your assessment of this				

1. Customer Service/CARES - Practices Children's Customer Service Behavior Standards (CARES Model) – <u>Collaborative</u>: Collaboration and teamwork - combining effort, mutual respect, open and honest communication, sharing of responsibilities and the willingness to work together in a fair and equitable manner resulting in achievement of common goals. <u>Accountable</u>: Willing to accept individual responsibility by being responsive, taking initiative, following through and working efficiently and ethically. <u>Respectful</u>: Embracing individual differences by showing regard for the privacy of our patients and acceptance of the values, cultures and beliefs of our patients and co-workers that allows us to care for a diverse community. <u>Excellent</u>: Expecting the best of oneself and others. Having high energy, a positive attitude with a can-do spirit resulting in a healthy environment. <u>Safe</u>: Maintains a safe work environment by considering the design, equipment and processes needed to achieve the lowest risk of injury and error.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Often unwilling to handle criticism, complaints, specific requests. Doesn't consistently listen well and may be overwhelmed or defensive. Makes exceptions that create problems. Communicates well with some, not well with others. Doesn't regularly communicate proactively.	Responsive to criticism and complaints without getting defensive. Holds self-accountable to meet reasonable expectations. Establishes and maintains effective relationships. Listens attentively and provides needed information. Customer oriented and responsive.	Assertively and creatively goes extra mile to please customers. Anticipates customer needs and expectations to respond proactively. Customer focused when working on projects across teams. A mentor to co-workers in their response and accountability to internal/external customers.

Comments:

Recommendations for growth:

2. <u>Clinical/Technical/Business Skill</u> - Possesses the clinical/technical/business knowledge and skills to do the Job at a high level of accomplishment: applies skills effectively; picks up and learns new skills quickly; keeps up with new technology; demonstrates interest in and accountability to the functions of the job.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Resists learning new skills. Stuck in past practices and/or technologies. Fails to demonstrate new skills. Does not complete required training. Does not display required skills to accomplish the job.	Quickly picks up and applies new skills. Develops and /or keeps up with new practices and/or technologies. Shares knowledge with others. Work performed is done in an efficient manner. Displays the necessary skills to perform proficiently.	Applies knowledge toward improving on-going systems and processes. Volunteers to present new information to staff. Volunteers to learn/ try new practices/ technologies and/or roles. Mentors co-workers to develop preceptor/technical skills.

Comments:

Recommendations for growth:

3. Quality/Process Improvement - Comes up with new and innovative ideas; concentrates efforts on important priorities; focuses on patient and employee safety as a personal and organizational priority; sets goals and objectives; breaks down complex processes into simple steps; is dedicated and accountable to providing highest quality services and is committed to continuous improvement as it relates to both job duties/work processes and departmental/organizational financial stability. Strives to maintain a safe working environment for self and others.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Uses past/familiar practices. Doesn't work to simplify things. Doesn't participate in improvement processes. Consistently identifies problems without offering solutions. Is not appropriately aware of revenue process improvement efforts and recommendations and decisions routinely do not correspond with these efforts. Does not routinely work within the established safety guidelines for their position.	Plans, organizes, and sets goals and objectives according to quality standards. Considers new ideas and solutions. Clearly defines problem before taking action to resolve. Identifies solutions to problems, and implements the solution. Assists with establishing, monitoring, and measuring team performance and safety standards and goals. Has a basic understanding of revenue process improvement efforts and routinely makes recommendations and decisions with these efforts in mind. Is aware of workplace safety requirements and works within these guidelines.	Frequently a pro-active contributor of original ideas and/or process improvement suggestions. Establishes a system for monitoring quality or improvement. Leads performance improvement initiatives and shares with other work areas. Educates co-workers in quality and productivity improvement principles. Has a solid understanding of revenue process improvement efforts and performs in a manner consistent with these efforts. Is dedicated to workplace safety and consistently maintains safe working conditions for self and others.

Comments:

Recommendations for growth:

4. <u>Team Relationships</u> - Seen as cooperative and a team player, easily gains trust and support of peers; encourages collaboration; finds common ground; offers candid feedback to peers.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Doesn't understand team	Understands and values the	Invites feedback on own ideas.
expectations or needs. Not open	nature of teams. Uses win-win	Takes leadership role in team
to negotiation with peers. May	solutions to resolve conflict.	activities/projects. Mentors direct,
reject team decision-making	Communicates with peers with	appropriate
processes. Doesn't have skills or	direct, appropriate and timely	communication/feedback process
interest to participate as a team	feedback. Informs team members	to peers. Uses active listening
member. Disruptive to team effort.	of work problems encountered	skills. Facilitates team meetings,
Does not meet department	and suggests ways to improve	projects and team development.
standard for meeting attendance	team performance. Demonstrates	Empowers other staff to improve.
or team participation.	flexibility, readily adapting to	
	changing needs of team. Uses	
	active listening skills.	

Comments:

Recommendations for growth:

5. <u>Safety</u> - Responsible for adhering to CHHC guidelines and policies regarding safety. Maintains a safe work environment. Exhibits work-safe practices in all actions and behaviors.

NEEDS DEVELOPMENT	PROFICIENT	OUTSTANDING
Does not routinely work within the established safety guidelines for their position. Does not wear appropriate personal protective equipment.	Adheres to safety standards and guidelines. Encourages safety among peers and patient families. Wears appropriate personal protective equipment when required. Attends safety training sessions. Reports all unsafe situations.	Dedicated to workplace safety and consistently maintains safe working conditions for self and others. Takes an active role in mentoring other employee's on safety guidelines. Frequent contribution for safety improvements and communications.

Comments:

Recommendations for growth:

University of California Office of the President

Employee Performance Evaluation Form

Em	ploye	e Nai	me:	Job Title:
Dep	artm	ent:		Unit:
Rev	iewir	ng Su	pervi	isor: Review Period:
Peri	iod Sı	uperv	ised	by Performance Reviewer: Period Employee in This Job:
P	AR'	ГО	NE:	REVIEW OF PERFORMANCE ELEMENTS
EXC	EEDS	JOB	EXE	CTATIONS Consistently exemplary performance, including in demanding situations or circumstances.
	MEE	TS J	OB E	KPECTATIONS Competent performance in most situations and circumstances.
	-	PA		LLY MEETS JOB EXPECTATIONS Shows capability, but in a variable manner. Improvement needed in key areas.
			DO	ES NOT MEET JOB EXPECTATIONS Major or ongoing problems that negatively impact organizational objectives.
*	4	*	*	(COMMENTS, THOUGH OPTIONAL, ARE ENCOURAGED)
				COMMUNICATION Clearly expresses ideas. Readily shares appropriate work-related information.
				WRITTEN - Uses clear and appropriate language in writing.
				ORAL Verbally conveys information in a clear and accurate manner in a variety of situations. Where applicable, produces and delivers formal presentations.
				JOB KNOWLEDGE Demonstrates expertise in the functional aspects of the job.
				AND RIGHT DE DEMONSTRACE CAPITAGE IN the functional despects of the job.
				PRODUCTIVITY Reflects the accuracy, volume, and timely manner in which work is performed. Also recognizes ability to determine priorities and maximize efficiency. **ACCURACY** Consistently produces accurate work. **VOLUME** Consistently produces the designed volume of work based on department/unit priorities. **TIMELINESS** Consistently produces work in a timely fashion **SELF-MANAGEMENT** Sets own priorities, regularly completing work on schedule. Utilizes resources available to maximize efficiency.
				CUSTOMER FOCUS Establishes and maintains good working relationships with both external and internal customers by understanding and responding promptly and courteously to customer needs and expectations.

EXC	EEDS	JOB	EXE	CTATIONS Consistently exemplary performance, including in demanding situations or circumstances.
	MEETS JOB EXPECTATIONS Competent performance in most situations and circumstances.			
		PA	RTIA	LLY MEETS JOB EXPECTATIONS Shows capability, but in a variable manner. Improvement needed in key areas.
			D	DES NOT MEET JOB EXPECTATIONS Major or ongoing problems that negatively impact organizational objectives.
~	+	-	W.	(COMMENTS, THOUGH OPTIONAL, ARE ENCOURAGED)
			,	
			_	
				THOUSAND COVERED CONTROL OF STREET AND ADDRESS OF STREET AND ADDRESS OF STREET
Ш		Ш		TECHNOLOGY SKILLSProficient use of work-related equipment, tools, and technology.
			Γ	
			1	
			L	
		ليا		PROBLEM SOLVING Reviews facts and data, using sound judgement, to arrive at the most effective solution.
			_	
				Della
Ш	ш		Ш	INTERPERSONAL RELATIONS Builds productive rapport with employees at all levels within and outside the department. Treat others with fairness, dignity, and respect.
			1	
				,
	 7			
Ш	Ш	Ш	Ш	TEAMWORK Works collaboratively with fellow employees and others to achieve identified goals and objectives.

EXC	EXCEEDS JOB EXECTATIONS Consistently exemplary performance, including in demanding situations or circumstances.						
	MEE	TS J	OB E	KPECTATIONS Competent performance in most situations and circumstances.			
-	1	PARTIALLY MEETS JOB EXPECTATIONS Shows capability, but in a variable manner. Improvement needed in key areas.					
	DOES NOT MEET JOB EXPECTATIONS Major or ongoing problems that negatively impact organizational objectives.						
*	*	*	V	(COMMENTS, THOUGH OPTIONAL, ARE ENCOURAGED)			
				FLEXIBILITY- Adjusts performance to accommodate changes in departmental direction and processes.			
				CREATIVITY/INNOVATIONExplores and suggests new approaches and methods to effect departmental goals and responsibilities.			
				DEPENDABILIT¥ Consistently adheres to set work schedule.			
		SU	?/ER	RVISORY AND MANAGEMENT ELEMENTS			
				LEADERSHIP Creates a culture supportive of staff, which fosters individual motivation, high levels of individual and team performance, and quality of service.			
				DEVELOPMENT OF STAFF Develops necesssary skills in employees and maximizes existing skills in all employees.			
				PERFORMANCE MANAGEMENT Provides employees with performance standards, expectations, and ongoing feedback regarding progress. Constructively addresses performance problems in accordance with UC collective bargaining and/or personnel policies and procedure:			

EXC	EEDS	JOB	EXE	CTATIONS Consistently exemplary performance, including in demanding situations or circumstances.
1	MEE			XPECTATIONS Competent performance in most situations and circumstances.
		PA		LLY MEETS JOB EXPECTATIONS Shows capability, but in a variable manner. Improvement needed in key areas.
			DC	DES NOT MEET JOB EXPECTATIONS Major or ongoing problems that negatively impact organizational objectives.
V	*	*	*	(COMMENTS, THOUGH OPTIONAL, ARE ENCOURAGED)
			Г	
				RESOURCE MANAGEMENT Manages assets including technology, equipment, budget, and space, where applicable.
				ORGANIZATIONAL CONTRIBUTION Ensures that supervised employees understand and make an identifiable contribution to the
				organization's mission and objectives.
			1	
			L	
PA	RT	TW	0:	SUMMARY REVIEW OF EMPLOYEE PERFORMANCE
Supe	rvisor	descr	ibese	mployee's major assignments and accomplishments, key strengths, performance shortfalls, and other performance elements that characterize the ce during the review period. This description should help determine the overall performance rating.
empi	oyee:	s perre	Jimai	te during the review period. This description should help determine the overall performance rating.

PART THREE: OVERALL PERFORMANCE RATING EXCEEDS JOB PARTIALLY MEETS JOB DOES NOT MEET JOB MEETS JOB EXPECTATION **EXPECTATIONS EXPECTATIONS EXPECTATIONS** PART FOUR: GOALS AND FUTURE DIRECTION Supervisor discusses employee's performance improvement needs and action plan, training recommendations, and future goals and expectations for employee's job performance. REQUIRED SIGNATURES REVIEWING SUPERVISOR DATE MANAGEMENT REVIEWER DATE I have reviewed this evaluation of my performance and received a copy. My signature indicates neither agreement nor disagreement with this evaluation. EMPLOYEE DATE_ EMPLOYEE COMMENTS

UNIVERSITY OF CALIFORNIA - OFFICE OF THE PRESIDENT

PERFORMANCE EVALUATION FORM

Employee Name	Dept.:	Division			
	Unit:				
Job Title	Period covered by this evaluation From: / / To: / /	Type of evaluation Probationary ☐ Annual ☐			
Supervisor's Name	Supervisor's Title	Supervised this employee since			

PURPOSE OF PERFORMANCE EVALUATION

The written performance evaluation is the last phase of the ongoing performance management and assessment process. It is a formal evaluation of performance over a specified period of time based on expectations identified by the supervisor and shared with the employee. It provides feedback to the employee and assists in planning for the next performance period. Informal performance evaluation is the on-going feedback required for effective supervisor/employee relations. The written evaluation should not replace continuing feedback and communications on job performance.

TIMING OF EVALUATIONS

Career employees who have attained regular status must be evaluated formally at least once a year.

Probationary employees must be evaluated at least once; usually 30 calendar days before the completion of the probationary period.

STEPS IN THE FORMAL EVALUATION PROCESS

- 1. Before completing this form and conducting the formal evaluation, the supervisor should complete the following steps:
 - · Review Personnel Policies for Staff Members 23.
 - Review existing performance expectations and objectives and ensure that they are realistic and attainable during this
 rating period.
 - Meet with the employee to schedule the evaluation meeting and describe the evaluation process.
 - Suggest that the employee review the existing performance expectations and prepare a self-evaluation.
 - · Prepare a draft of the evaluation.
- 2. The supervisor and employee meet to discuss both the self-evaluation, the draft, and future performance plans. The employee's comments should be encouraged.
- The supervisor completes the final evaluation form based on discussion with the employee.

RETENTION

Performance evaluations are retained in the employee's departmental personnel folder.

Record Copy: 5 years after separation. Other Copies: 3-5 years.

RESPONSIBILITIES List responsibilities in order of priority. Responsibilities are key job functions/ duties which are listed on the position description.	RATING (check one) Exceeded expectations Met expectations Did not meet expectations EXPECTATIONS List performance standards for each responsibility. Performance is rated "Met Expectations" when these standards are achieved.

ACTUAL ACHIEVEMENTS Describe the performance for this review period in relation to the performance standards (expectations) for each responsibility or objective listed.							
(Can be done as a narrative and attached to the Evaluation Packet.)							

Proposition (A. C.	PERFC	PRMANCE STRENG	THS	American commence of the second commence of the commence of th
	Describe aspects of	f performance that we	ere outstanding.	
	description of the second section of the second section of the second second second second section of the second s			
		S FOR IMPROVEME ere performance coul		
		,		
Indicate overall rating should be based on p the Comments section ratings and specific objectives. The relativexceptional circumstan	y of performance by performance of all re on briefly state the examples cited for we priority of the re	esponsibilities and ob reason for the over or key areas of res responsibilities and o	nark in the appropria bjectives listed for thi all rating, taking into ponsibility and indiv objectives should be	s review period. In consideration the vidual performance considered. Also,
Did not meet Expectations	Short of Expectations	Met Expectations	Exceeded Expectations	Far Exceeded Expectations
MMENTS:		the property of the second	- L	

	·
SUPERVISORY PERFORMANCE EVALUATION-INSERT A	
Employee Name Date	AND A TOTAL POPULATION OF THE PROPERTY OF THE
AFFIRMATIVE ACTION & EEO Describe affirmative action efforts that this employee made during the rating period. Inconsideration of new hires, employees who resigned, promotions, reclassifications, education support development opportunities.	olude oport
DEVELOPMENT AND PERFORMANCE EVALUATION OF SUBORDINATES Discuss the quality, accuracy, and frequency of feedback given subordinates, along with efforts mad to enhance their professional development.	е
MANAGEMENT PRACTICES Discuss planning, delegation, communication, recognition, inter-departmental collaboration, volumete, budget control, and other management practices essential to performance and maximizemployee contribution and satisfaction.	vork zing

FUTURE PLANS AND DEVELOPMENT ACTIVITIES										
Discuss future development wo	growth, uld be bei	specific neficial.	activities	to	improve	performance	and/or	areas	where	further
•										
	EMPLO	OYEE C	OMMEN	VTS	AND R	ECOMMEN	DATIO	NS		
Supervisor's Signature		resument from the construction	Date		Secretary Walnut Co.	en e				
Cupo. 100, 0 Cg. atau			24.0		nor eval	bloyee's Signatur disagreement, bu uation, it has bee opportunity to reco	it it does n discusse	indicate ed with ye	that you	have read the
Endorsing Supervisor's Signat	ure		Date		life	opportunity to reco	ra your co	mments.		
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