



**PERFORMANCE PLANNING AND APPRAISAL FORM**  
***NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL***

<b>Employee Name:</b>	<b>Supervisor Name:</b>
<b>Position Title:</b>	<b>Date of Review:</b>
<b>Department:</b>	<b>For Period:</b> <b>To</b>

At the *beginning of each performance cycle*, employee and supervisor review key responsibilities (from the job description). The supervisor and employee document specific responsibilities, with outcomes that describe how successful performance will be measured. Employee and supervisor then assign a priority to each activity. These will be documented in Section I – Key Responsibilities (pages 2 and 3). In addition, employee and supervisor should discuss the Performance Factors described on pages 4 and 5 and agree on how they apply to the employee’s work.

*Ongoing communication* regarding performance is expected, both in informal and formal settings throughout the year. Either the supervisor or employee should feel free to initiate discussion of performance progress, expectations, priorities or obstacles.

At the *end of each performance cycle*, a formal review of achievements in relation to the performance standards is documented. This includes a summary of employee performance during the performance cycle in relation to individual responsibilities and outcomes.

The following ratings are given to indicate how the employee has performed in relation to performance responsibilities and outcomes.

**RATINGS SCALES**

<b>Rating Level</b>		
<b>1 = Below Standards or Expected Results</b>	<b>2 – 3 = Meets Expectations</b>	<b>4 – 5 = Exceeds Expectations</b>
Performance is below standards. Employee does not fully achieve assigned goals. Work assignments are not consistent in meeting quality standards or deadlines. Employee requires close supervision and does not consistently demonstrate the ability to perform job functions at expected level of proficiency.	Satisfactorily performs assigned activities and achieves expected outcomes. Work assignments typically are completed on time and meet all quality standards. Employee works under general or minimum supervision, with demonstrated understanding of all job functions and expected standards.	Quality and quantity of work is routinely higher than expected. Performance reflects high degree of initiative, commitment to excellence and ability to anticipate and respond to FIT’s needs. Employee demonstrates mastery of all job functions and frequently “raises the bar” in contributing to new systems and procedures.

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
**NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL**

**Section I - KEY RESPONSIBILITIES**

<b>Employee Name:</b>	<b>Supervisor Name:</b>
<b>Position Title:</b>	<b>Date of Review:</b>
<b>Department:</b>	<b>For Period: From</b> <span style="float: right;"><b>To</b></span>

At the beginning of the performance cycle, employee and supervisor review key responsibilities from the employee’s job description. The supervisor documents specific outcomes to be achieved, in a way that describes how successful performance will be measured. Employee and supervisor then assign a “Priority” (Critical, Moderate or Routine/episodic) for each responsibility or objective. The priority designation guides both employee and supervisor in monitoring activities relative to their importance to the department. Employee and supervisor establish appropriate timeframes for regular performance feedback to monitor progress toward achieving goals. Such timeframes may be **As Needed, Weekly, Monthly, Quarterly, or Semi-annually**, depending on the nature of the activity.

It is expected that the employee and primary supervisor will meet throughout the performance cycle to review progress, identify and resolve problems and modify this plan, if necessary. If there are changes (*i.e.*, responsibilities, outcomes or priorities), they should be noted on the performance log.

At the end of the year, the employee rates his or her own performance, and the supervisor rates the employee’s performance, using the rating scale on page 1. The purpose of the self-evaluation is to encourage dialogue around performance outcomes and related issues. This provides the basis for discussion between the employee and supervisor about accomplishments and issues that affected performance. Following the discussion, the supervisor determines the “Final Rating” for each objective, considering the employee’s self-evaluation, the relative priority of the objective and other relevant factors.

**Section I - KEY RESPONSIBILITIES**

DATE MODIFIED	KEY RESPONSIBILITY	EXPECTED OUTCOME	PRIORITY	FEEDBACK FREQUENCY	SELF-RATING	SUPERVISOR RATING	FINAL RATING

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
***NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL***

DATE MODIFIED	KEY RESPONSIBILITY	EXPECTED OUTCOME	PRIORITY	FEEDBACK FREQUENCY	SELF-RATING	SUPERVISOR RATING	FINAL RATING

**Section I Total Rating:** \_\_\_\_\_ *(Add "Final Ratings" for each responsibility, then divide by total number of responsibilities assigned)*

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
**NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL**

**Section II - PERFORMANCE FACTORS**

The following factors are important indicators of the skills and abilities an employee brings to the performance of his or her duties. In addition to evaluating key responsibilities and performance objectives, these performance factors help to assess total performance. At the beginning of the annual performance cycle, supervisors and employees identify expectations for successful performance. These performance expectations may be explained in the "Comments" section.

At the end of the annual performance cycle, the supervisor rates the degree -- 1 (Below Standards/Expectations), 2 or 3 (Meets Expectations) or 4 or 5 (Exceeds Expectations) -- to which the employee reflects these characteristics in the regular performance of his/her duties. Please use specific examples and comments to illustrate your rating.

<b>Performance Factors</b>	<b>Applies</b>	<b>Not Applicable</b>	<b>Self Rating</b>	<b>Supervisor Rating</b>	<b>Final Rating</b>
<b>PROFICIENCY IN CURRENT ROLE:</b> <ul style="list-style-type: none"> <li>• Demonstrates knowledge of position and/or team role.</li> <li>• Understands how position and responsibilities fit within the organization and contribute to department results.</li> </ul>					
<b>QUALITY OF WORK:</b> <ul style="list-style-type: none"> <li>• Maintains standards consistently. Is consistent in achieving accuracy, neatness, thoroughness, overall effectiveness and attentiveness to detail.</li> </ul>					
<b>QUANTITY OF WORK:</b> <ul style="list-style-type: none"> <li>• Produces expected volume of work in a timely manner.</li> </ul>					
<b>PLANNING AND ORGANIZATION OF WORK:</b> <ul style="list-style-type: none"> <li>• Establishes priorities. Anticipates and prepares for changing workload or working conditions.</li> <li>• Coordinates and uses available resources to get work done to assure important deadlines are met.</li> </ul>					
<b>INITIATIVE:</b> <ul style="list-style-type: none"> <li>• Shows ability to work independently in context of the job.</li> <li>• Demonstrates willingness to assume additional responsibility.</li> <li>• Suggests ways to enhance work processes or operations.</li> </ul>					
<b>INTERPERSONAL RELATIONS:</b> <ul style="list-style-type: none"> <li>• Maintains positive working relationships.</li> <li>• Is flexible and willing to cooperate with others.</li> <li>• Demonstrates ability to listen and understand.</li> </ul>					

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
**NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL**

Performance Factors	Applies	Not Applicable	Self Rating	Supervisor Rating	Final Rating
<b>VERBAL &amp; LISTENING SKILLS:</b> <ul style="list-style-type: none"> <li>• Expresses self well verbally, using language appropriate for the intended audience.</li> <li>• Listens actively and acknowledges understanding.</li> </ul>					
<b>WRITING SKILLS:</b> <ul style="list-style-type: none"> <li>• Presents ideas clearly in written format, using appropriate language, grammar and style.</li> </ul>					
<b>TEAM PARTICIPATION:</b> <ul style="list-style-type: none"> <li>• Proactively builds partnerships and seeks involvement with other constituencies/employees.</li> <li>• Works cooperatively and effectively with team members.</li> <li>• Demonstrates clear understanding of team goals and contributes to their achievement.</li> </ul>					
<b>DISCRETION AND CONFIDENTIALITY</b> <ul style="list-style-type: none"> <li>◆ Knows what FIT information or materials are sensitive and why.</li> <li>◆ Demonstrates ability to maintain sensitive information in confidence, sharing only with appropriate contacts.</li> </ul>					
<b>PUNCTUALITY AND ATTENDANCE:</b> <ul style="list-style-type: none"> <li>◆ Arrives and is ready to begin working at scheduled time.</li> <li>◆ Maintains acceptable record of attendance.</li> </ul>					
OTHER: (Specify any other critical Performance Factors here)					

**Section II Total Rating:** \_\_\_\_\_ (Add "Final Ratings" for each factor, then divide by total number of factors applied)

**Employee's Comments on Performance Factors:**

**Supervisor's Comments on Performance Factors:**

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
***NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL***

<b>Section III - DEVELOPMENT GOALS</b>
----------------------------------------

Employee and supervisor discuss and document development goals to be achieved during the next performance cycle. These may include formal training or education courses, on-the-job training, temporary project assignments or mentoring programs. This should include an assessment of how much a priority the development goal is: **(C)** = Critical; **(M)** = Moderate; and **(VA)** = Value Added.

Target dates for achievement of these development goals are outlined, along with any explanation of how they will help the employee’s personal or professional development. To identify these goals, employee and supervisor review development needs identified in the previous performance cycle.

<b>Development Goals/Purpose</b>	<b>Priority</b>	<b>Target Dates</b>

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
**NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL**

**OVERALL PERFORMANCE RATING**

Enter the **Total Ratings** for Performance Objectives (page 3) and Performance Factors (page 5). Add the **Total Ratings** and divide the sum by 2 to calculate the **Overall Rating**.

	<b>Total Rating</b>
<b>a) Section I: Key Responsibilities</b> <i>(page 3)</i>	a)
<b>b) Section II: Performance Factors</b> <i>(page 5)</i>	b)
<b>SUBTOTAL:</b> <i>Add lines a) and b)</i>	c)
<b>OVERALL RATING</b> <i>Divide line c) by 2</i>	d)

**PERFORMANCE PLANNING AND APPRAISAL FORM  
NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL**

*Any additional comments may be attached as a separate sheet.*

<b>Senior Administrator's Comments</b>

**SIGN-OFF AND REVIEW** (Please indicate date signed after your signature)

	<b>Signature</b>	<b>Date</b>
Employee		
Supervisor		
Senior Administrator *		

*\* If the appraisal is for one of the President's direct reports, the President signs off as Senior Administrator.*

**PERFORMANCE PLANNING AND APPRAISAL FORM**  
***NON-BARGAINING UNIT, NON-MANAGEMENT PERSONNEL***

<b>President's Comments</b>

**BONUS**

Supervisors are to recommend to the President whether each administrative employee in their respective area should or should not be considered for a bonus. Please check "Yes" or "No." Bonuses should be a reflection of exemplary performance over the year. Bonuses will not become part of the base salary.

	<b>BONUS</b>	
<b>Recommend a bonus increase:</b> Please check "Yes" or "No"	<b>YES</b>	<b>NO</b>

	<b>Signature</b>	<b>Date</b>
President		