



PERFORMANCE PLANNING AND APPRAISAL FORM
MANAGEMENT PERSONNEL

Employee Name:	Supervisor Name:
Position Title:	Date of Review:
Department:	For Period: To

At the *beginning of each performance cycle*, employee and supervisor establish performance objectives based on FIT's strategic plan and department objectives. The supervisor and employee document specific performance objectives to be achieved, as well as outcomes that describe how successful performance will be measured. Employee and supervisor then assign a priority to each activity or objective. These will be documented in Section I – Performance Objectives on pages 2 and 3. In addition, the employee and supervisor should review FIT's competency model and determine which are applicable to the employee's performance. Specific examples may be identified on page 4 of this form.

Ongoing communication regarding achievement of goals 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 objectives is documented. This includes a summary of employee performance during the performance cycle in relation to individual goals and objectives.

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

RATINGS SCALES

Rating Level		
1 = Below Standards or Expected Results Performance is below standards. Employee does not fully achieve assigned goals. Work assignments are not consistent in meeting quality standards or deadlines.	2 – 3 = Meets Expectations Usually meets work goals and objectives. Work assignments typically are completed on time and meet all quality standards. Demonstrates ability to perform all job functions at a satisfactory level.	4 – 5 = Exceeds Expectations 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.

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Section I - PERFORMANCE OBJECTIVES

Employee Name:

Supervisor Name:

Position Title:

Date of Review:

Department:

For Period: From

To

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 and the college. Employee and supervisor establish appropriate timeframes for regular performance feedback to monitor progress toward achieving goals. These 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 in strategic direction that affect performance during the course of the year (*i.e.*, objectives, outcomes or priorities), the changes should be noted on this form, with the effective date.

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.

DATE MODIFIED	PERFORMANCE OBJECTIVE	EXPECTED OUTCOME	PRIORITY	FEEDBACK FREQUENCY	SELF- RATING	SUPERVISOR RATING	FINAL RATING

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DATE MODIFIED	PERFORMANCE OBJECTIVE	EXPECTED OUTCOME	PRIORITY	FEEDBACK FREQUENCY	SELF- RATING	SUPERVISOR RATING	FINAL RATING

Section I Total Rating: _____ (Add "Final Ratings" for each objective, then divide by total number of responsibilities assigned)

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Section II - COMPETENCIES

The following competencies help define how job activities are to be performed. At the beginning of the performance cycle, the supervisor and employee should identify the appropriate level for the employee's performance (see the Competency Model for descriptions). At the end of the year, the employee rates his or her performance in relation to the competency, as does the supervisor, using the 1 to 5 rating scale shown on page 1 of this form. The supervisor determines the "Final Rating", taking into consideration information provided by the employee.

Use specific examples and comments to illustrate your rating, when possible. Please comment on any unsatisfactory ratings. Once all applicable competencies have been rated, the average rating is calculated by adding together all the scores and dividing by the number of competencies rated.

Competencies	Level	SELF-RATING	SUPERVISOR RATING	FINAL RATING	Employee Comments	Supervisor Comments
Job Knowledge						
Communications						
Relationship Management						
Project Management						
Problem Solving & Decision-Making						
Leadership						

Section II Total Rating: _____ (Add "Final Ratings" for each Competency, then divide by the number of ratings)

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Section III - DEVELOPMENT GOALS

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.

Development Goals/Purpose	Priority	Target Dates

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OVERALL PERFORMANCE RATING

Enter the **Total Ratings** for Performance Objectives (page 3) and Competencies (page 4). Add the **Total Ratings** and divide the sum by 2 to calculate the **Overall Rating**.

	Total Rating
a) Section I: Performance Objectives <i>(page 3)</i>	a)
b) Section II: Competencies <i>(page 4)</i>	b)
SUBTOTAL: <i>Add lines a) and b)</i>	c)
OVERALL RATING <i>Divide line c) by 2</i>	d)

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Any additional comments may be attached as a separate sheet.

Senior Administrator's Comments

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

	Signature	Date
Employee		
Supervisor		
Senior Administrator *		

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

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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.

	BONUS	
Recommend a bonus increase: Please check "Yes" or "No"	YES	NO

BONUS SIGN-OFF (Please indicate date signed after your signature)

	Signature	Date
Supervisor		
Senior Administrator		

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President's Comments

	Signature	Date
President		