

**Appendix 13: 2015-2016 Performance Evaluation Forms**



## ANNUAL PERFORMANCE EVALUATION FORMS

2015-2016

Pillsbury United Communities values the importance of its employees and is committed to their professional development. One way to enhance professional development is through the Performance Evaluation process. By writing down professional and organizational goals, both the employee and supervisor have a shared understanding and commitment towards growth and results. Performance reviews also incorporate feedback on how well employees meet professional expectations in areas such as attendance, effective communication, ability to work on a team, time management, and data collection. It is the goal of Pillsbury United Communities to retain motivated, talented, and committed employees.

### Instructions:

- Employees will complete pages 2-13, carefully reading and following directions in each section.
- Once completed, the employee will save the document (Word format) and send to their direct supervisor.
- Supervisors will use the same forms sent by their employee and provide their score and comments.
- Both scores will be reviewed during the performance review meeting and a final score will be documented.
- All forms are due to your direct supervisor by **Friday, July 15, 2016**.

### Sections include:

- Self – Assessment
- Leadership Competencies
- 2015-2016 Goals, Indicators, and Results
- 2016-2017 Goals, Indicators, and Results
- 2015-2016 Professional Development Plan
- 2016-2017 Professional Development Plan
- Signature and Scoring Page

This performance review process is for all regular part-time and full-time employees hired prior to January 1, 2016. There are a few additional job classifications that will require a performance review; however, those supervisors should consult with Human Resources. Any merit increases will be effective July 8, 2016.

If you have questions regarding this process, please contact [Adair Mosley](#), your direct supervisor, or Human Resources.

Thank you.



## PERFORMANCE EVALUATION SELF-ASSESSMENT

### I. Identifying Information

<b>Name:</b>	<b>Date:</b>
<b>Location:</b>	<b>Position:</b>
<b>Supervisor:</b>	

### II. List your major areas of work over the previous year and does it align with your current job description?

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### III. List up to 3 accomplishments, from the previous year, that you are most proud of.

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### IV. List up to 3 things that you set out to accomplish but didn't work out as expected. With the opportunity to redo it, what would you change?

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<b>V. Are there changes that could be made to improve your effectiveness?</b>
<b>VI. What committees, boards, affinity groups or conferences did you attend in the last year and how has it helped your work?</b>
<b>VII. Please provide any additional comments not captured in the above questions.</b>



**ANNUAL PERFORMANCE EVALUATION FORMS**

**2015-2016**

**I. Identifying Information**

<b>Name:</b>	<b>Date:</b>
<b>Location:</b>	<b>Position:</b>
<b>Supervisor:</b>	
<b>Director:</b>	

## II. Leadership Competencies

Employee will self rate in the following categories: Personal Leadership, Team Leadership, Results Leadership, and Community Leadership. The supervisor will also rate; scores will be compared and discussed during the performance review meeting and a final score will be given. Each category has four competency areas and is rated on a scale of 1-4.

This section is worth 64 points of your evaluation.

### 4 - Exceeds Expectations

The employee consistently exceeds expectations. Contributions to the organization are highly visible and valuable.

### 3 - Meets Expectations

Performance consistently meets the requirements of the position. All required tasks and job responsibilities are carried out in an appropriate manner with a minimum amount of guidance and supervision.

### 2 - Improvement Needed

Performance did not consistently meet expectations. Performance failed to meet expectations in one or more essential areas of responsibility. A professional development plan to improve performance must be included in review.

### 1 - Unsatisfactory

Performance was consistently below expectations in most essential areas of responsibility and/or reasonable progress towards expectations was not made. A professional development plan to improve performance must be included in review.

Category	Competency	Criteria	Self	Supervisor	Final
Personal Leadership	Accountability	Accepts leadership responsibility; ownership for areas that you can influence; self aware; credible.			
	Resilience and Adaptability	A willingness to be flexible and respond quickly and effectively to changing circumstances, cultural adaptability, and an ability to respond to adversity.			
	Development and Learning	Seeks new experiences to develop; solicits and acts on feedback; learns from experience; coachable; continuous improvement.			

	Professionalism	Respectful, considerate, supportive, and trustworthy. Deals with disagreements or different points of view in a constructive, successful manner, maintains positive relationships even under difficult circumstances, personal credibility.			
<b>Feedback/Comments</b>			<b>Total Score</b>		
<b>Category</b>	<b>Competency</b>	<b>Criteria</b>	<b>Self</b>	<b>Supervisor</b>	<b>Final</b>
<b>Team Leadership</b>	Vision	Communicates a strong vision for the future, builds a sense of shared responsibility; ability to create and sustain a vision, to inspire, to model, to prioritize – in an effort to achieve the agency’s mission and vision.			
	Collaborative	Demonstrates the ability to develop, maintain and strengthen partnerships with others inside or outside the agency; Cross-functional knowledge and perspective; supports agency-wide efforts; politically astute.			
	Communication	Demonstrates proficiency at expressing ideas, sharing information, listening, offering and receiving constructive feedback; Ensures any concerns about the contribution of peers or projects are communicated clearly and effectively, interpersonal skills; Provides clear, motivating and constructive feedback.			
	Talent Development	Power, knowledge and decision making are dispersed; creates an environment that attracts quality staff, volunteers and interns; utilizes strengths of the team, offers strategic guidance, support, recognition and feedback; on boarding, performance management is reflective of agency’s mission and values ensuring feedback, and addressing performance problems and issues promptly.			
<b>Feedback/Comments</b>			<b>Total Score</b>		

Category	Competency	Criteria	Self	Supervisor	Final
<b>Results Leadership</b>	Manages Execution	Demonstrates the ability to take responsibility for one's own and the team's performance by setting clear goals and expectations, tracks progress against the goals, Complies with policies and procedures, prioritize; delegation, clarifying, tracking, measuring and communicating agency initiatives, policies and practices.			
	Big Picture	Considers the big-perspective of the organization and not focused purely on program, center, or specific area of oversight; Contributes and/or creates strategies that best serve the organization.			
	Financial Acumen	Demonstrates a keen understanding of what it takes in order to fulfill mission- understands how financial decisions impact the agency's bottom line; understands financial data and how to act on it.			
	Change Management	Demonstrates support for innovation and for agency wide changes needed to improve effectiveness; initiating, sponsoring, and implementing, organizational change; helping others to successfully manage agency wide change.			
<b>Feedback/Comments</b>			<b>Total Score</b>		
Category	Competency	Criteria	Self	Supervisor	Final
<b>Community Leadership</b>	Public Relations	Seeks opportunities to seek out potential supporters/partners; publicizing specific programs and services, networking and relationship building.			

	Cultural Competency	Inclusive and respectful; works well with others regardless of their level or background, cross cultural knowledge, ability to understand, appreciate and interact with persons from cultures and/or beliefs systems other than own.			
	Outreach and Responsiveness	Commitment to engaging the community; including informing, consulting with, involving, collaborations.			
	Partnerships and Engagement	Participation in community events, neighborhood groups, boards; Politically astute.			
<b>Feedback/Comments</b>			<b>Total Score</b>		
<b>Leadership Competencies Total Score out of 64</b>					

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## II. Goals, Indicators, and Outcomes from current year (2015-2016)

Insert last year's goals, indicators, and results into the section below. The supervisor will add results as well.

Employee will self-rate each section on a scale of 1-4 based on completion. Supervisors will provide a score, too. Results and scores will be compared during the review process and a final score will be given.

Goal	Indicators	Employee Results	Supervisor Results	Self	Supervisor	Final
<b>Goals, Indicators, and Results total score out of 16</b>						

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#### IV. Professional Development Plan from current year (2015-2016)

Insert last year's Professional Development Plan into the section below.

Each professional development goal is scored based on a met or unmet completion. Employee, if you met the goal score 2.5 points, if not score 0 points. Supervisor, please provide a score based on completion. Results and scores will be compared during the performance review process and a final score will be given.

This section is worth 10 points of your evaluation.

Select one competency in each section.	Goal	Self	Supervisor	Final
<b><u>Personal Leadership</u></b> Accountability Resilience and Adaptability Development and Learning Professionalism				
<b><u>Team Leadership</u></b> Vision Collaborative Communication Talent Management				
<b><u>Results Leadership</u></b> Manages Executive Big Picture Financial Acumen Change Management				
<b><u>Community Leadership</u></b> Public Relations Cultural Competency Outreach and Responsiveness Partnerships and Engagement				
<b>Professional Development Plan total score out of 10</b>				

#### V. Goals, Indicators, and Results for upcoming year (2016-2017)

The supervisor and employee will establish goals for the upcoming performance evaluation year (2016-2017). These goals will not be scored until next year during the performance review process. This section is worth 5 points of your evaluation. If completed, the employee will receive 5 points. If not, the employee will receive 0 points

**VI. Professional Development Plan for upcoming year (2016-2017)**

The employee and supervisor will complete the form together.

Goal	Indicators	Results (results will be added during next year's review process)
<b>Goals, Indicators, and Results total score out of 5</b>		

A professional development plan documents the goals, required skill and competency development, and objectives a staff member will need to accomplish in order to support continuous improvement and career development. This plan is personal to your individual and career growth.

Please select a competency in each of the following areas and document an associated goal.

This section is worth 5 points of your evaluation. If completed, the employee will receive 5 points. If not, the employee will receive 0 points.

Select one competency in each section.	Goal
<p><b><u>Personal Leadership</u></b>            Accountability            Resilience and Adaptability            Development and Learning            Professionalism</p>	
<p><b><u>Team Leadership</u></b>            Vision            Collaborative            Communication            Talent Management</p>	
<p><b><u>Results Leadership</u></b>            Manages Executive            Big Picture            Financial Acumen            Change Management</p>	
<p><b><u>Community Leadership</u></b>            Public Relations            Cultural Competency            Outreach and Responsiveness            Partnerships and Engagement</p>	
<b>Professional Development Plan total score out of 5</b>	

**VII. Signature and Scoring Page**

<b>Name:</b>	<b>Date:</b>
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<b>Location:</b>	<b>Position:</b>
<b>Supervisor:</b>	
<b>Mid – Year Review Date:</b>	

Do you have all of the following completed?

Provide final score for the following categories:	Score
Leadership Competencies Performance Appraisal	
Goals, Indicators and Results for 2015-2016	
Professional Development Plan for 2015-2016	
Goals, Indicators and Results for 2016-2017	
Professional Development Plan for 2016-2017	
Signature Page	No score
Job Description ( <b>only if changes have been made</b> )	No score
<b>Total Score out of 100</b>	

<b>Salary Increase Matrix</b>			
<b>Does Not Meet Expectations 69 and below</b>	<b>Average Performance 70 to 79</b>	<b>Above Average Performance 80 to 89</b>	<b>Outstanding Performance 90 to 100</b>
<b>0%*</b>	<b>60% of maximum: 1.5% increase</b>	<b>80% of maximum: 2.0% increase</b>	<b>100% of maximum: 2.5% increase</b>

\*Supervisor consults with HR regarding next steps.

Employee Signature:	Date:
Direct Supervisor Signature (Required):	
Director Signature (Required):	
President and CEO Signature (if score is 69 and below):	

