

Employee Name

Date



Staff Review and Development Plan

This document, as part of the University Staff review and Development Program, can be used as a tool for:

Professional Development

- Training and coaching
- Performance

Communication

- Annual performance
- Self-assessment
- Periodic performance

Human Resources Decisions

- Transfer and promotion
- Salary increase

Staff Review Guidelines

Staff Input (Pages 4–5)

- Employee completes and returns the Staff Input section of the plan to the supervisor before the annual performance review meeting.

Staff Review (Pages 6–8)

- Supervisor reviews the employee's Staff Input section and all other pertinent information to be used to review performance.
- Supervisor completes the Staff Review section.
- Supervisor meets with employee to discuss the Staff Review.

Action & Development Plans (Page 4)

- Supervisor asks employee to draft next year's Action Plan and Development Plan.
- Supervisor meets with the employee to reach consensus on each of the Plans.

Performance Factors

The following performance factors reflect University values and priorities. These factors should be considered in conjunction with any unit-specific factors (page 3) and all relevant performance standards when reviewing performance throughout the review period.

JOB KNOWLEDGE: Demonstrates the appropriate specialized knowledge required to perform the job; effectively performs duties and responsibilities; keeps current with new developments in areas of responsibility.

JUDGMENT AND PROBLEM SOLVING: Anticipates and identifies problems; gathers facts and analyzes causes; evaluates alternative solutions; takes or recommends actions; follows up to ensure problem resolution.

SELF-MANAGEMENT: Produces services/output efficiently; effectively uses time and meets deadlines; is punctual and reliable; works effectively with directions given; takes initiative; provides acceptable volume of work.

TEAMWORK: Shares information and resources with others; gives timely responses to requests made by others; interacts well with all individuals; establishes and maintains effective working relationships; promotes teamwork and values the group's success.

QUALITY: Effectively produces a caliber of work consistent with departmental standards; completes work thoroughly and accurately; pays attention to detail; contributes to the improvement of the quality of services provided by the University.

SUPPORT OF DIVERSITY: Demonstrates a respect for the value of individuals regardless of their background or culture; contributes to processes that create and support a diverse environment; participates in diversity programming and activities.

CUSTOMER SERVICE: Effectively represents the University to students, parents, faculty, staff, patients, alumni, and other customers of the University; understands and constructively responds to customer needs.

COMMUNICATION: Effectively conveys ideas, information, and/or instructions to others; listens attentively and clarifies information when necessary; participates in meetings effectively; contributes to establishing a favorable communication environment; understands instructions.

Staff Review Guidelines

Unit-Specific Factors (Page 6)

Use these factors for performance criteria that are vital to the individual's position but not otherwise covered by this instrument. Factors may include general skill areas, such as the examples listed below, or specific performance goals that are part of the unit's strategic plan or the employee's Action Plan. Discuss these factors with the employee at the *beginning* of the review period.

A few *examples of factors* follow:

SUPERVISION: (This factor must be completed for employees responsible for supervising others.) Effectively delegates and coordinates the work of others; contributes to the selection, training, development, and evaluation of assigned staff

PROJECT LEADERSHIP: Effectively operates independently in delegating work to peers and coordinating the work of others on projects

CREATIVITY: Discovers and implements new and improved ways of doing things; breaks out of the "status quo" to find better ways to accomplish goals

Overall Evaluation Rating (Page 8)

5 — Significantly Exceeds Performance Expectations
Consistently and significantly exceeds performance expectations throughout the review period.

Exceptional performer. Understands and contributes to the organization's mission, thinking beyond the details of the job and working toward the overall goals of the department. Shows initiative, is a self-starter, works independently, and makes unique and valuable contributions to the organization. Exercises exceptional leadership in several areas of work responsibilities.

4 — Exceeds Performance Expectations

Often exceeds standards of performance. Outstanding performer. Takes initiative to develop and implement new programs and/or work processes to improve overall quality within the work unit. Plans own work. Anticipates problems, makes recommendations and decisions, and takes appropriate action when necessary. Exceeds performance expectations on some of the most difficult and complex facets of the job.

3 — Meets Performance Expectations

Consistently meets acceptable standards of performance. Good performer. Completes projects and tasks thoroughly and produces consistent output of work. Handles all responsibilities of the position in a satisfactory manner. Provides reliable input and recommendations.

2 — Partially Meets Performance Expectations

Occasionally meets standards of performance; performance is inconsistent. Marginal performer. Significant improvement needed in certain aspects of job responsibilities to meet acceptable performance standards.

1 — Does Not Meet Performance Expectations

Consistently does not meet standards of performance. Performance of job responsibilities is unsatisfactory and unacceptable. Performance needs to be addressed in an HR-78 letter (Staff Failure to Meet Acceptable Standards of Performance).

This publication is available in alternative media on request.

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Complete and submit parts I and II to supervisor prior to the review meeting.

Employee Name

Date

I. Accomplishments

In your responses to the items below, please be as specific as possible, providing examples when appropriate. If you need to include additional sheets of paper, please do so.

Action Plan. List accomplishments from the past year that relate to the job responsibilities and performance standards stated in your Action Plan. Accomplishments that went beyond the performance expectations in your Action Plan should also be included.

Development Plan. List accomplishments from the past year and relate to the performance expectations stated in your Professional Development Plan. Include professional activities completed to increase your effectiveness at work for current and/or future job responsibilities.

Number of Professional Development Activities _____

Approximate Time in Hours _____

Unit-Specific Factors (OPTIONAL)

Use unit-specific factors for performance criteria that are vital to the individual's position but not otherwise covered by this instrument. Factors may include general skill areas, such as the examples listed on page 3, or specific performance goals that are part of the unit's strategic plan or the employee's Action Plan. Discuss these factors with the employee at the *beginning* of the review period.

Identify and define any unit-specific factors in the spaces below.

1. Factor

2. Factor

3. Factor

Staff Review

TO BE COMPLETED BY SUPERVISOR

Employee Name
Review Period
Name of Reviewer

Date
College
Department

I. Performance Feedback

Discuss past year's performance as it reflects the performance standards stated in the employee's Action Plan and his/her Accomplishment Report. Describe employee's performance incorporating the University's eight performance Factors (page 2) and unit-specific Factors (page 3). When describing employee's performance, the following words may be helpful: significantly exceeds expectations; exceeds expectations; meets expectations; partially meets expectations; and does not meet expectations.

II. Suggestions for Growth and Development

Discuss suggestions, opportunities, etc., for employee growth and professional development. Consider employee's input from the Self Assessment (page 5) and any additional areas to provide continuing development of the employee (use additional pages if necessary).

Staff Review

TO BE COMPLETED BY SUPERVISOR

Employee Name _____

III. Professional Development Activities

Record the number of professional development activities completed by the employee during the review period, and estimate the time spent completing those activities. Consider all formal and informal activities intended to increase effectiveness for current and/or future job responsibilities.

Number of Professional Development Activities _____

Approximate Time in Hours _____

IV. Overall Rating

Complete for all employees. Considering all dimensions and factors, choose the overall rating as defined on page 3 that best describes this employee's overall contribution during the review period. If any employee does not meet expectations for a particular performance factor, this should be addressed under "Suggestions for Growth and Development."

5 — Performance significantly exceeds expectations

4 — Performance exceeds expectations

3 — Performance meets expectations

2 — Performance partially meets expectations

1 — Performance does not meet expectations

Signature of Reviewer _____

Date _____

Concurrence of Administrative Officer _____

Date _____

*Signature of Individual Reviewed _____

Date _____

**Signature indicates only that this Staff Review has been discussed and does not necessarily signify concurrence. A response to this review may be made on a separate sheet and attached.*