

# Performance Review Form - Leaders

(Review Year)

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Job Title: \_\_\_\_\_ Job Code: \_\_\_\_\_

Division/Department: \_\_\_\_\_

Manager Name (Reports to): \_\_\_\_\_

## Review Type:

- Self--assessment
- Annual
- Interim / Off--cycle
- Probationary
- Transfer

Performance reviews are a key component of employee development. This evaluation is intended to be a fair and balanced assessment of the employee's performance since the last review. Meaningful two-way feedback provides the employee and the manager with an understanding of how past performance combined with a review of expectations creates an environment for career growth and continuous improvement.

## Goals & Key Responsibilities

This section provides employees and managers with the ability to rate and comment on current year performance goals and/or key job responsibilities. **All five goals & key responsibilities must be rated in order for this section to provide an accurate score.**

1  
Not Meeting  
Expectations

2  
Needs Some  
Improvement

3  
Fully Meets  
Expectations

4  
Fully Meets & Often  
Exceeds Expectations

5  
Consistently Exceeds  
Expectations

Score: \_\_\_\_\_ 1.

Score: \_\_\_\_\_ 2.

Score: \_\_\_\_\_ 3.

Score: \_\_\_\_\_ 4.

Score: \_\_\_\_\_ 5.

Average Score: \_\_\_\_\_

# Core Competer

1  
Not Meeting  
Expectations

2  
Needs Some  
Improvement

3  
Fully Meets  
Expectations

4  
Fully Meets & Often  
Exceeds Expectations

5  
Consistently Exceeds  
Expectations

## Personal Accountability

**Commitment to Quality** – Takes pride in work, strives for excellence. Takes responsibility for performance and fixes mistakes. Continually looks to improve the quality/quantity of work.

**Safety Consciousness** – Contributes to a safe working environment; performs duties in a clean and safe manner. Brings safety concerns to appropriate parties; takes initiative to resolve when possible.

**Attendance and Punctuality** – Fulfills work and time requirements. Keeps unscheduled absences to a minimum. Plans for coverage of responsibilities where appropriate.

**Reliability/Dependability** – Meets task deadlines and work commitments. Fulfills work obligations in a timely and satisfactory manner. Takes responsibility for personal actions and performance.

**Appearance** – Dresses appropriately. Avoids wearing strong fragrances or other strong odors (e.g., from smoking). Keeps workplace neat, clean and organized.

Score: \_\_\_\_\_

Supporting Comments and Examples:

## Professionalism

**Self-Awareness** – Demonstrates continuous professionalism, respect, and workplace civility. Mindful of actions; topic, tone, volume, and body language. Avoids gossip.

**Working with Others** – Approachable, inclusive, and respectful. Exhibits teamwork, takes initiative to help. Courteous and cooperative. Respects diversity and appreciates differences.

**Relationship to Supervisor** – Responds and acts cooperatively; works to maintain positive relationships with supervisor/manager. Accepts responsibility for own actions.

**Gives and Receives Feedback** – Provides constructive feedback to colleagues. Mindful of both verbal and body language when giving feedback. Receptive to feedback from others; accepts feedback without defensiveness.

**Role Modeling** – Conducts self in fair and trustworthy manner. Upholds professional and ethical standards. Demonstrates departmental and organizational values including Integrity, Compassion, Accountability, Respect, and Excellence.

Score: \_\_\_\_\_

Supporting Comments and Examples:

# Core Competer

1  
Not Meeting  
Expectations

2  
Needs Some  
Improvement

3  
Fully Meets  
Expectations

4  
Fully Meets & Often  
Exceeds Expectations

5  
Consistently Exceeds  
Expectations

## Functional Expertise

**Job Knowledge** – Clearly demonstrates functional expertise as it relates to the job. Strives for excellence. Asks relevant questions when uncertain. Shares information and knowledge with others.

**Learning Agility** – Keeps abreast of new developments and enhancements to systems, procedures and products. Values learning; seeks out new learning and development opportunities. Completes learning assignments in a timely manner.

**Problem Solving & Decision Making** – Uses good judgment when evaluating a problem. Analyzes risks and identifies consequences. Makes appropriate decisions in a timely manner. Uses problem solving strategies to work through roadblocks and deliver timely results in a manner that is consistent with organizational values.

**Policy Awareness** – Understands and adheres to departmental and organizational standards, policies and processes as appropriate. Asks relevant questions when uncertain. Continuously works to maintain standards.

**Use of Resources** – Works to reduce waste by identifying ways to be more efficient with time, money, or processes. Where appropriate is aware of equipment and supply costs; understands appropriate use of resources. Demonstrates a sense of organizational stewardship.

Score: \_\_\_\_\_

Supporting Comments and Examples:

## Service Excellence

**Treatment Towards Others** – Listens carefully, expresses compassion and empathy where appropriate. Mindful of the perspective and needs of others (e.g. colleagues, patients, students, families and others).

**Service Orientation** – Embraces organization and department mission. Works to understand goals and objectives of the unit or the department.

**Communication** – Communicates ideas and messages clearly and concisely. Actively listens, seeks to understand others. Answers questions clearly and asks clarifying questions when needed. Keeps others informed when deadlines are challenged.

**Productivity** – Works to deliver an expected volume of work; seeks operating efficiencies without sacrificing quality. Works to stay organized. Uses technology as needed/where appropriate.

**Responds to Change** – Adapts to changing priorities. Handles unexpected situations and does so in a calm and positive manner. Where appropriate, questions and recommends alternatives to new processes and procedures.

Score: \_\_\_\_\_

Supporting Comments and Examples:

# Leadership Competencies

1  
Not Meeting  
Expectations

2  
Needs Some  
Improvement

3  
Fully Meets  
Expectations

4  
Fully Meets & Often  
Exceeds Expectations

5  
Consistently Exceeds  
Expectations

**Effective Communication** - Writes and speaks clearly. Articulates ideas and instructions in a clear and concise manner. Encourages dialogue and candor; makes it safe for others to voice their opinion. Active listener; takes the time to consider alternative points of view. Keeps others informed; conveys important information in a timely and efficient manner.  
Score: \_\_\_\_\_

**Partnership & Team Building** - Values, respects and is open to others' point of view. Relates well to people at all levels of the organization. Actively works to build a team. Empowers employees to take action. Supports team decisions both publicly and privately. Manages conflict; builds common ground, focuses on the positive and seeks constructive outcomes. Demonstrates care and concern for all team members and those we serve.  
Score: \_\_\_\_\_

**Organizational Effectiveness** - Takes initiative to get things done. Actively sets priorities. Runs effective meetings; starts/stops on time, maintains focus on topic. Analyzes short-term and long-term risks; identifies pros and cons; evaluates options and chooses effective solutions. Makes critical decisions in a timely manner.  
Score: \_\_\_\_\_

**Performance Management** - Tracks, monitors, and documents employee performance. Actively encourages goal setting. Provides timely, effective, and constructive feedback. Holds team members accountable for their performance and results. Delegates tasks appropriately. Creates an environment where employees and others feel valued and appreciated. Routinely recognizes team members for their contributions formally and/or informally.  
Score: \_\_\_\_\_

**Leading Change & Innovation** - Champions change and innovation. Readily adapts to change, makes adjustments when needed. Helps others overcome resistance to change. Stays calm in the face of great change. Actively encourages and supports new ideas. Leads process improvement, encourages efficiency, works to build value for the organization. Helps develop innovative solutions.  
Score: \_\_\_\_\_

**Stakeholder Focus** - Maintains positive and collaborative connection to key stakeholders. Understands needs, goals and objectives of all constituent groups. Works to create, monitor, and exceed key metrics and targets in support of key groups.  
Score: \_\_\_\_\_

**Strategic Thinking & Planning** - Ability to see the big picture by thinking conceptually, imaginatively, and systematically. Visionary and forward thinking; able to see long-term opportunities. Demonstrates the ability to develop effective plans in line with organizational goals. Actively sets priorities. Works to focus energy and resources toward common organizational objectives.  
Score: \_\_\_\_\_

**Industry / Regulatory Compliance Knowledge** - Exhibits knowledge of, and ensures compliance with, federal and state regulatory requirements (for example: Affirmative Action, FLSA, NY Wage and Hour Laws, HIPAA, Joint Commission, non-discrimination laws, FERPA, etc.). Initiates appropriate follow-up when concerns are identified. Demonstrates increasing knowledge of the organization, industry and marketplace. Leverages industry knowledge and business acumen to make appropriate decisions. Keeps abreast of new developments with organizational systems, procedures, and policies.  
Score: \_\_\_\_\_

**Average Score:** \_\_\_\_\_

Supporting Comments and Examples:

# Performance Goal Planning

The purpose of this section is to create Performance Goals for the next performance review cycle. These new performance goals will be rated during the next annual performance review cycle. The creation of 3-5 performance goals is highly recommended.

**Goal #1**

**Goal #2**

**Goal #3**

**Goal #4**

**Goal #5**

## Summary Section

Section	Section Weight	Section Score	Weighted Score
Goals & Key Responsibilities	35%		
Core Competencies	35%		
Leadership Competencies	30%		

### Overall Performance Review Score

0.0 – 1.4  
Not Meeting  
Expectations

1.5 – 2.4  
Needs Some  
Improvement

2.5 – 3.4  
Fully Meets  
Expectations

3.5 – 4.4  
Fully Meets and Often  
Exceeds Expectations

4.5 – 5.0  
Consistently  
Exceeds Expectations

Final Comments – Manager Writing Review:

Final Comments – Employee Being Reviewed:

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_