

PERFORMANCE PLAN (rev. 6/1/09)

Employee Name ↗ *(as it appears on payroll)* _____ Rater ↗ _____

Title ↗ _____ Title ↗ _____

EIN ↗ _____ Department ↗ _____

Appraisal Cycle / Effective Dates of Plan: From: _____ To: _____
(Min 90 calendar days/max approximately 1 yr) (mo/yr) (mo/yr)

Progress Review Discussion(s): Anticipated _____
(Minimum 1 per appraisal cycle) Month(s) / Year(s)

PART 1: STAFF DEVELOPMENT OPPORTUNITIES

List targeted training and development goals for this appraisal cycle or indicate "None".

AREA(S) OF DEVELOPMENT	METHOD OF DEVELOPMENT	DESIRED OUTCOME

PART 2: PERFORMANCE IMPROVEMENTS

List areas identified in the current appraisal (covering the previous appraisal cycle) that require improvement during this appraisal cycle, or indicate "None".

AREA(S) REQUIRING IMPROVEMENT	EXPECTATIONS	TIME LINE

PART 3: CUSTOMIZED PERFORMANCE DIMENSIONS

Indicate **Add** for new dimensions and **Carryover** for dimensions included in the employee's previous plan that are being utilized again. Include a minimum of 3 / maximum of 5 dimensions per appraisal cycle.

	<input type="checkbox"/> Add <input type="checkbox"/> Carryover
	<input type="checkbox"/> Add <input type="checkbox"/> Carryover
	<input type="checkbox"/> Add <input type="checkbox"/> Carryover
	<input type="checkbox"/> Add <input type="checkbox"/> Carryover
	<input type="checkbox"/> Add <input type="checkbox"/> Carryover

PERFORMANCE PLAN SIGNATURES

Performance plans must not be retroactive, therefore the month / year following the Rater's and Employee's signatures below must match the beginning month / year of the plan effective dates on page 1. If not, the start date of this performance plan must be adjusted to match the month / year that the employee will actually receive it.

Rater's Signature & Date

I met with the employee and discussed this performance plan. I explained that they will, at the end of the appraisal cycle, be appraised on the dimensions listed in Part 3 of the plan as well as on three Organizational Conduct dimensions included on the appraisal. If a supervisory employee, I further explained that they will also be appraised on three Leadership dimensions included on the appraisal.

Rater's Signature ↗
(Signs first, immediately after discussing plan with employee)

Date ↗
(mo/day/yr plan discussed with employee)

Employee's Signature & Date

I was given the opportunity to discuss the contents of this performance plan with my Rater. I understand that at the end of this appraisal cycle I will be appraised on the dimensions listed in Part 3 of this plan as well as on three Organizational Conduct dimensions (attendance & punctuality, interactions with others, and work habits). I further understand that if I am a supervisor, I will also be appraised on three Leadership dimensions (staff relations, productivity results, and supervision) included on the appraisal.

Employee Signature ↗
(Signs second, immediately after discussing plan with Rater)

Date ↗
(mo/day/yr plan discussed with Rater)

Reviewer's Signature & Date *(Final approval)*

I concur with the content of this performance plan.

Reviewer's Signature ↗
(Signs last, after Employee/Rater meet and sign)

Date ↗
(mo/day/yr)

Original – Department File / Copy – Employee

Please do not submit to Human Resources