

**LSUHSC-SCHOOL OF MEDICINE
PERFORMANCE PLANNING AND REVIEW FORM**

Employee Name: _____

Employee ID #: _____

Job Title: _____

Does this employee supervise others? ____Yes ____No

Anniversary Date: _____ Rating Period: _____ to _____

PERFORMANCE PLANNING SESSION – SIGNATURES

TO COMPLETE THE PLANNING SESSION, BOTH THE MANAGER AND EMPLOYEE MUST SIGN HERE AFTER DISCUSSING ALL CHARACTERISTICS UPON WHICH THE EMPLOYEE WILL BE RATED.

My manager has discussed with me the characteristics upon which I will be rated and the performance expectations for the upcoming rating period.

Employee's Signature

Date

I have discussed with this employee the characteristics upon which he/she will be rated and the performance expectations for him/her during the upcoming rating period.

Rating Manager's Signature

Date

PERFORMANCE LEVELS

The following performance levels are to be used for the evaluation:

DISTINGUISHED (9)

Truly outstanding performance that results in extraordinary and exceptional accomplishments with significant contributions to objectives of the department, division, group or company.

COMMENDABLE (8-7)

Consistently generates results above those expected of the position. Contributes in a superior manner to innovations both technical and functional.

FULLY SATISFACTORY (6-5-4)

Good performance with incumbent fulfilling all position requirements and may on occasion generate results above those expected of the position.

NEEDS IMPROVEMENT (3-2)

Performance leaves room for improvement. This performance level may be the result of new or inexperienced incumbent on the job or an incumbent not responding favorably to instruction.

MARGINAL (1)

Lowest performance level which is clearly less than acceptable, and which is obviously well below minimum position requirements. Situation requires immediate review and action. Possible separation or reassignment is in order without significant and immediate performance.

REQUIRED JOB PERFORMANCE CHARACTERISTICS

(Refer to Definitions of Ratings on page 1)

1. QUALITY OF WORK – Accuracy, work free of errors and mistakes, overall quality of work in general.

Performance Expectation: Employee uses experience and training to achieve results; produces work that is thorough; pays attention to detail; work is accurate and neat; demonstrates understanding of how his/her work contributes to overall success; completes full amount of work on time.

_____	Highest quality possible, final job virtually perfect.	9
_____	Quality above average with very few errors and mistakes.	8-7
_____	Quality very satisfactory, usually produces error free work.	6-5-4
_____	Room for improvement, frequent errors, work requires checking and re-doing.	3-2
_____	Excessive errors and mistakes, very poor quality.	1

2. DEPENDABILITY/RELIABILITY/AVAILABILITY – Can be counted on.

Performance Expectation: Employee can be counted on to take care of work-related commitments; gives extra effort when needed; can be counted on to do what is expected even when not being watched; reports on time, as scheduled; makes sure duties are covered when absent. The degree to which the employee is reliable, persistent, and available.

_____	Highly persistent, always gets the job done on time.	9
_____	Very reliable, above average, usually persists in spite of difficulties.	8-7
_____	Usually gets the job done on time, works well under pressure.	6-5-4
_____	Sometimes unreliable and will miss deadlines, avoids responsibility, satisfied to do the bare minimum.	3-2
_____	Usually unreliable, does not accept responsibility, gives up easily.	1

3. ADAPTABILITY AND FLEXIBILITY– Adjusting to change.

Performance Expectation: Employee accepts and applies constructive criticism; changes routines to meet new needs, changing conditions, or unexpected problems; looks for ways to learn new job skills.

_____	Extremely adaptive and flexible, changes routines without comment or complaint.	9
_____	Makes changes and adjustments easily.	8-7
_____	Initial resistance but eventually changes and adapts.	6-5-4
_____	Resistant to change, does not adapt easily to changing conditions or unexpected problems unless strongly urged by management.	3-2
_____	Completely resistant to change and very rigid in regards to work and routines.	1

4. COMMUNICATION SKILLS– Giving and receiving information.

Performance Expectation: Employee listens carefully and asks questions when needed; shows that he/she understands important concepts and documents; communicates clearly when speaking or writing; delivers accurate messages in a timely fashion; makes excellent oral presentations; uses appropriate communication tools for the situation; calls meetings as needed.

_____	Excellent communicator, speaks and writes clearly, concisely and accurately, listens carefully and asks relevant questions when needed.	9
_____	Very good written, oral and listening communication skills.	8-7
_____	Good communication skills, speaks and writes in a professional manner, listens carefully.	6-5-4
_____	Below average, does not always speak and write in professional manner, has difficulty communicating needs, listening skills need improvement.	3-2
_____	Poor skills in all areas of communication.	1

5. DECISION MAKING/ PROBLEM-SOLVING SKILLS– Thinking on the job.

Performance Expectation: Employee uses good judgment about what should be done and when it should be done basing decisions on fact rather than emotion; solves problems independently but seeks help from the right source when that is appropriate; looks for better ways of doing things if appropriate; considers ideas from various sources and chooses the one best solution.

_____	Uses exceptionally good judgment when analyzing facts and solving problems.	9
_____	Above average judgment, thinking is very mature and sound.	8-7
_____	Handles most situations very well and makes sound decisions under normal circumstances.	6-5-4
_____	Uses questionable judgment at times, often fails to make decisions within the appropriate time frame, makes decisions without needed analysis.	3-2
_____	Uses poor judgment, usually fails to make decisions within appropriate time frame and without needed analysis.	1

6. PROJECT PLANNING, IMPLEMENTATION AND WORK OUTPUT– Creating and successfully following through with projects (such as special goals, activities, or large assignments)

Performance Expectation: Employee anticipates long-range challenges and opportunities; sets specific goals and priorities; designs realistic work methods and timetables for achieving project goals; keeps track of progress toward goals; completes full amount of work on time; adapts to project changes as needed.

_____	Exceptionally good at setting goals and priorities, always does more than expected, completes projects on time, adapts easily to changes.	9
_____	Good at setting goals and priorities, produces more work than most, completes projects on time, adapts easily to changes.	8-7
_____	Average at setting goals and priorities, sometimes needs assistance, occasionally does more than required, usually completes projects on time, adapts to changes without problems.	6-5-4
_____	Has a tendency to procrastinate, plan poorly, low volume producer, completes projects late and or over budget, does not adapt well to project changes.	3-2
_____	Extremely low out-put, fails to complete projects, needs help in time management, setting goals, priorities, and adapting to changes in projects.	1

7. INITIATIVE AND CREATIVITY – Plan, suggest ideas and work independently.

Performance Expectations: Employee possesses the ability to plan work projects on their own and to go ahead with a task without being told every detail; will make constructive suggestions and think outside the box when and where appropriate.

_____	Displays unusual drive and perseverance, anticipates needed actions, frequently suggests better ways of doing things.	9
_____	A self starter, proceeds on own with little or no direction, progressive, makes some suggestions for improvement.	8-7
_____	Very good performance, shows initiative in completing tasks.	6-5-4
_____	Does not proceed on own, waits for direction, below average worker.	3-2
_____	Lacks initiative, drive and perseverance, poor performer.	1

8. COOPERATIVENESS – Working effectively with and providing courteous service to coworkers and clients

Performance Expectation: Employee shows courtesy to all; listens carefully to coworkers/clients to understand their individual needs; participates openly in investigations when needed, follows instructions without unreasonable complaining or arguing; gets appropriate help for a coworker/client both within and outside of his or her own work area; follows up to be sure coworker/client needs are met.

Always displays courtesy and respect, stimulates teamwork and positive attitude, identifies correctly and understands coworkers/client's needs, goes out of their way to satisfy coworker/client needs, always follows up.	9
Courteous when dealing with coworker/client, does their best to identify and meet coworker/client needs, follows up.	8-7
Usually courteous when dealing with coworker/client, normally will satisfy needs and conduct follow up.	6-5-4
Must be prodded or contacted more than once before helping to satisfy coworker/client needs, doesn't always follow up.	3-2
Negative and hard to get a long with, provides inaccurate information, does not follow up.	1

Job Performance Characteristic #9 Is Mandatory for Managers

9. MANAGEMENT AND LEADERSHIP SKILLS – Directing the activity of subordinates.

Performance Expectation: Manager plans and assigns work effectively and fairly; sets realistic but challenging work goals; gives subordinates the resources, guidance, and training opportunities needed to perform at their best; measures work in progress; achieves results through the high quality and quantity of work group's efforts; leads a work group that contributes to the achievement of organizational goals; recommends corrective action and/or discipline when appropriate.

Exceptionally good at analyzing work, setting goals, developing plans of action, utilizing time, distributing work fairly and providing necessary support, motivation and resources, handles discipline action appropriately.	9
Above average at planning and organizing work, setting goals and utilizing time, distributing work and providing support, motivation and resources, and handling discipline problems.	8-7
Average at planning, organizing work, occasionally requires help, does not always utilize time wisely, motivate and provide resources and handle discipline problems.	6-5-4
Needs to improve planning, goal setting skills, as well as time utilization, distribution of work, providing motivation, resources and handling of discipline problems.	3-2
Unacceptable management and leadership skills, leads a work group that gets a lot of complaints.	1

Use the space below to provide additional comments regarding any of the performance characteristics, #s 1-9.

Positive areas of present performance:

Areas requiring improvement:

What has the employee done to improve performance from the previous review?:

Developmental Plans/Goals:

Overall Performance Rating (cumulative): _____ Divided by # of Job Characteristics: _____

Circle one category below:

1	2-3	4-5-6	7-8	9
Marginal	Needs Improvement	Fully Satisfactory	Commendable	Distinguished

EMPLOYEE COMMENTS:

Signatures acknowledge this form was discussed and reviewed:

Employee
Date: _____

Manager/Supervisor
Date: _____

Department Head
Date: _____