

## **WSHA Performance Review Materials – Table of Contents**

1. Co-worker Feedback Form
2. Employee Feedback Form
3. Employee Feedback on Supervisor
4. Definitions of “Performance Rating” for Performance Review Summary
5. Performance Review Instructions
6. Performance Evaluation Form
7. Performance Review Summary
8. Definitions of “Performance Rating” for Performance Review Summary
9. Core Competencies
10. Individual Development Plan
11. Individual Development Plan Worksheet -- Example

## Co-worker Feedback Form (Optional)

**Instructions:** This is an opportunity to provide feedback, both positive and constructive criticism, to your co-worker who has requested your input for his/her review. In some cases, this request may be coming from your co-worker's supervisor. We can all learn a great deal about our strengths and weaknesses through the eyes of others and this form is for personal development use only. Your feedback is to remain anonymous and will be shared only with the employee it is intended for. Please fill out this form and return it to the designated supervisor. Do not keep a copy.

When making your comments, consider how this person works with others; how they communicate; how they make your job easier; how they contribute to the goals of their department or organization. Try to answer the questions with the kind of feedback that you would want to find out about yourself to help you improve in your position.

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

Employee's Supervisor: \_\_\_\_\_

**What is it like working with this employee?**

**Please list a few of the strengths and accomplishments you know of or have witnessed of this employee.**

**Name two suggestions to help this employee become more effective in his/her position.**

1.

2.

## Employee Feedback Form

**Instructions:** Please spend some time reflecting on your total work environment and the tools and resources you need to perform your job well. Consider individual and organizational issues as they affect your position. You may opt to fill out either section or both. Return this form to your supervisor several days before your scheduled review.

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

### Section 1:

<b>Please rate the following:</b>	<b>Always</b>	<b>Usually</b>	<b>Sometimes</b>	<b>Never/Not at all</b>	<b>N/A</b>
I receive enough information and direction to do my job					
The information provided on organizational decisions is at reasonable level					
Amount of work I am given is reasonable					
I receive credit for the work I do					
Time allotted for my projects is appropriate					
Coordination among my co-workers is adequate to complete projects					
Given limited funds, adequate resources (tools, materials and budget dollars) are given to my projects					
I have sufficient training to do what is asked of me					
My physical environment (noise, heat, interruptions, etc.) is adequate to complete my work					
My job description reflects my current responsibilities and expertise					

### Section 2:

**List comments and ideas for improvement:**

**How can we better work together to improve your performance and satisfaction with your current position?**

**What would you choose as your best work accomplishment in 2008? Why?**

## Employee Feedback on Supervisor (Optional)

**Instructions:** The purpose of this form is to elicit your feelings about your relationship with your supervisor and how his/her abilities affect your work. Your evaluation will remain anonymous and will be combined with others into one report and presented to the person your supervisor reports to for use in your supervisor's review. **Please return to Connie Ray, Director of Human Resources, by Monday, December 15.**

My supervisor is: \_\_\_\_\_

<i><b>Does your supervisor...</b></i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed To Meet Expectations	N/A
1. provide clear direction; clearly state expectations and goals?						
2. provide enough information to do job?						
3. meet regularly with you; monitors progress?						
4. coach or guide you?						
5. communicate issues from senior management?						
6. delegate work effectively?						
7. make herself/himself available for you when needed?						
8. conduct timely and thorough reviews?						
9. address poor performance?						
10. provide non-judgmental feedback?						
11. reward good performance?						
12. take into consideration personal needs outside of office?						
13. encourage personal development?						

*Additional Comments:*

*For any areas rated "Occasionally did not meet expectations" or "Failed to meet expectations," please suggest ideas for improvement:*

## ***Definitions of “Performance Rating” for Performance Review Summary***

### **1. Consistently Exceeded Expectation**

This employee’s performance was exceptional and was matched by very few employees. The employee consistently produced high quality model work. The employee was able to serve as a resource to other staff members. The employee demonstrated performance at a level well beyond normal expectations of the majority of experienced employees in a similar position.

### **2. Exceeded Expectations**

This employee exceeded the organization’s and/or department’s expectations. The employee demonstrated a high level of performance and exceeded expectations on special projects, in key areas and went above and beyond in certain situations.

### **3. Consistently Met Expectations**

This employee’s performance met the organization’s and/or department’s expectations for the position. The employee was viewed as performing well in meeting expectations and achieving goals. The employee was a solid performer.

### **4. Occasionally Did Not Meet Expectations**

This employee performed satisfactorily in some areas, but was weak or inconsistent in performing some responsibilities. Improvement and development is necessary for the employee to meet expectations for the position.

### **5. Failed to Meet Expectations**

This employee is not performing satisfactorily in several key areas. Work is substandard and responsibilities and expectations are not being met. Immediate improvement is required.

## **Performance Review Instructions for Employees**

1. Note review date. Forms are located on the Intranet under Human Resources
2. Fill out Employee Feedback Form and return to Supervisor several days before your review date.
3. If requested by your co-worker or co-worker's supervisor, fill out the Co-Worker Feedback Form and return when requested. You may elect not to fill out a form.
4. Fill out Career/Education Planning Form and return to Supervisor before your scheduled review. This form is optional.
5. Fill out Employee Feedback on Supervisor Form and return to Connie Ray, Director, Human Resources, by December 15. This form is optional.

## **Performance Evaluation Form (Optional)**

**Instructions:** This optional form is a tool for supervisors and directors an employee works for, to describe the employee's performance in each area. These areas reflect the values the organization feels are important for continual growth and success. The supervisor will use this information to help determine the employee's overall performance rating on the Performance Review Summary. It is the supervisor's discretion to share this form with the employee.

**The following performance levels are designed to serve as a guide for the evaluation.**

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## Performance Evaluation Form (Optional)

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

Evaluator: \_\_\_\_\_

### Time Management

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
work the agreed upon schedule?						
miss work only when necessary?						
set appropriate workload priorities?						
complete work assignments in a timely manner?						
anticipate workload and plan for possible changes?						
attend scheduled meetings?						
appropriately communicate absences to supervisor and others as designated?						

### *Additional Comments*

### Personal Accountability

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
demonstrate willingness to accept new or additional responsibilities?						
honor commitments?						
admit mistakes and accept responsibility?						
maintain responsibility for work delegated to others?						
adequately communicate personal limitations?						
take responsibility for communications?						

### *Additional Comments*

### Personal Growth

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
accept direction from supervisor and others?						
ask for assistance when necessary?						
modify performance in response to feedback and learning?						
seek opportunities to learn and develop?						

### *Additional Comments*



### Quality of Work

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
exhibit knowledge and mastery of all office equipment required to perform job?						
understand and apply instructions related to assignments?						
pay appropriate attention to detail?						
follow standards and guidelines set by the department, i.e. graphics, confidentiality, etc.?						
deliver high quality work and customer service?						

### Additional Comments

### Communication

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
use and check email, voice mail, and GroupWise calendar consistently?						
contribute regularly to internal and external communication mechanisms?						
participate appropriately in meetings?						
communicate the project status and issues to project manager?						
initiate communication in a timely fashion with supervisor?						
effectively communicate with all levels of staff?						
respond to requests in a timely manner?						
provide feedback in non-blaming, non-judgmental, tactful manner?						
promote sharing of information?						
appropriately communicate absences to supervisor and others as designated?						
actively listen to others?						

### Additional Comments

### Leadership

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
participate in the development of goals and plans?						
successfully motivate others?						
consider organization or system impact of issues?						
facilitate change in organizational processes?						
communicate goals, vision or plans to others?						

### Additional Comments

**Diversity**

<b><i>Does the employee .....</i></b>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
encourage expression of differing points of view?						
value the contributions of all individuals, regardless of organization level?						
successfully work with others who have different work styles?						
treat all coworkers appropriately and fairly?						

***Additional Comments*****Conflict Management**

<b><i>Does the employee .....</i></b>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
proactively express concerns in appropriate settings?						
take steps to resolve conflicts when necessary and appropriate?						
remain focused on issues and not individuals?						
bring conflicts to the attention of management if necessary?						

***Additional Comments*****Problem Solving and Decision Making**

<b><i>Does the employee .....</i></b>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
anticipate potential problems?						
solicit ideas, alternatives, and input from others?						
make decisions based on facts when possible?						
alert supervisor to potential problems?						
use good judgment?						
take necessary steps to implement solutions?						
exhibit willingness to make decisions?						

***Additional Comments***

**Organizational Citizenship**

<i>Does the employee .....</i>	Consistently Exceeded Expectations	Exceeded Expectations	Consistently Met Expectations	Occasionally Did Not Meet Expectations	Failed to Meet Expectations	N/A
consistently comply with organization policies and procedures?						
demonstrate knowledge of organizational vision, mission, purpose and major projects?						
work to dispel rumors?						
volunteer to assist others as appropriate?						
acknowledge contributions of others?						
share knowledge and expertise?						
appropriately use the organizational structure and individuals roles?						
actively support organizational decisions and goals?						
assist others to understand reasons for and benefits of decisions?						

***Additional Comments***

## Performance Review Summary

**Instructions:** The supervisor is responsible for finalizing this document and returning it to the Human Resources Department. The form is filed in the employee's personnel folder.

Name of Employee: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

Date of Meeting: \_\_\_\_\_

**Accomplishments during 2008:**

**Strengths and Skills demonstrated during 2008:**

(Note which are connected to core competencies – individual dev/program/organization.)

**Areas of Improvement or Focus for 2009:**

(Note which are connected to core competencies – individual dev/program/organization.)

**Goals and Expectations for 2009:**

(Note which are connected to core competencies – individual dev/program/organization.)

**Performance Rating (see attached sheet for definition):**

\_\_\_\_\_ consistently exceeded expectations

\_\_\_\_\_ exceeded expectations

\_\_\_\_\_ consistently met expectations

\_\_\_\_\_ occasionally did not meet expectations

\_\_\_\_\_ failed to meet expectations

**Comments by Supervisor and/or Employee:**

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Employee Signature

# Definitions of “Performance Rating” for Performance Review Summary

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Washington State Hospital Association

## Core Competencies

*To support the development of both the organization and its staff, WSHA has created core competencies to help define performance expectations to achieve its goals and objectives.*

**Commitment to Service to Our Members** – the ability to build strong relationships, anticipating and responding to members’ needs consistent with WSHA’s vision, mission and objectives.

**Ability to Deliver Results** – the ability to make realistic/relevant connections between one’s work, the work of WSHA and hospitals as businesses, caregivers, and employers.

**Personal Integrity** – the ability to accomplish one’s work by demonstrating integrity, trustworthiness, and dependability; and maintaining WSHA’s reputation as a leader in improving the health status of the citizens of Washington State.

**Effective Communication** – the ability to clearly articulate issues to members and key partners, articulate clear goals/work schedules for WSHA employees and partners, and proactively share and respond to information with appropriate internal and external groups.

**Effective Management** – the ability to advance the work of WSHA by managing its human, financial, and physical resources.

**Cultural Competency** – the ability to foster a respectful and inclusive workplace, creating practices that leverage diverse perspectives. Demonstrating the skills, attitudes, and sensitivities essential for leading in a diverse, multi-cultural world.

# Individual Development Plan

The Washington State Hospital Association is committed to a highly skilled, engaged and professional workforce. We want to work with you to develop your skills and talents; increasing your contribution to WSHA and assisting you in your career growth. This development plan is to be aligned with your program's, and the organization's, objectives and core competencies.

The Individual Development Plan (IDP) is focused on providing the help you and your supervisor think you may need to take the next steps in your career. The activities you identify should be *related to enhancing your job performance*, and should advance your program's and WSHA's goals.

You and your supervisor will jointly plan development activities and, together, will evaluate your progress at least twice a year.

Ask yourself the following questions:

## ***Key questions to consider:***

- Where am I today?
- What do I need to learn to do a better job in my current position?
  - Resources: job description, performance review, accomplishments
- What does my supervisor think I need to learn to do a better job in my current position?
- How do I incorporate WSHA's core competencies into my work? Are there core competencies I should focus on in the next year? How will these advance my job performance?
- Which of the core competencies does my supervisor feel I should focus on? How will these advance my job performance?
- Where do I want to be in the future? What does my supervisor see as my career path at WSHA?
  - Resource: HR has optional personal mission/vision exercise
  - Resource: You may choose as your professional development some in-person time with a coach/career counselor. Payment for this will come out of your total funds.
- What gaps do I need to fill to get to where I want to be in the future?
  - Keep in mind that your areas of development should be in context of the skills and values that will align you with your department's and WSHA's strategy, goals and core competencies.
  - Resources: HR has Learning Styles Inventory or Myers Briggs to target types of developmental activities. (See HR)

# Individual Development Plan Worksheet

*Key questions to consider in creating a plan with your supervisor:*

- Where am I today?
- What do I need to learn/what does my supervisor think I need to learn to do a better job?
- Which core competency or competencies should I focus on, and how will this advance my performance?
- Where do I want to be in the future?
- What gaps do I need to fill to get there?

Name:

Date:

For Year:

*List one to two development objectives, describe how it/they advance program objectives, and how they relate to WSHA's core competencies.*

1.

2.

## Implementation Plan

IDP Objective	Activity Steps	Cost/ Internal Resource	Target Date
1.			
2.			
	<b>TOTAL COST</b>		

Reviewed and Agreed to contents of this plan.

Employee:

Date:

Supervisor:

Date:

HR:

Date:



# EXAMPLE - Individual Development Plan Worksheet

Name: Joe Smith (Joe works for WSHA as a program director and needs more financial expertise and supervision expertise as his responsibilities change and with the thought that he might advance to a VP or Executive Director position within WSHA someday.)

Date: January 10, 2009

For Year: 2009

List one to two development objectives, describe how it/they advance program objectives, and how they relate to WSHA's core competencies.

1. Learn supervision skills because our program is expanding and I will have new supervisory responsibilities as we hire new staff. Effective communication, effective management and cultural competency are the related core competencies.

2. Obtain more financial expertise because part of my expanding job is to manage project budgets and ensure our budget targets are met. This goal connects to the effective management core competency by enhancing my ability to manage financial resources.

## Implementation Plan

IDP Objective	Activity Steps	Cost/ Internal Resource	Target Date
1. Supervision	Take three day supervisor training course through Washington Employers	\$175.00	Jan/Feb
	Participate in Supervisor brown bags or in-house trainings given to WSHA supervisors	No cost	All year
	Schedule one-on-one meetings with three WSHA supervisors and three supervisors outside of WSHA to find out what makes a good supervisor.	\$100 (lunch & travel costs)	March - May
	Attend two employment law workshops	\$100 per workshop	Through out year
2. Build financial expertise	Create budget for new survey project	No cost	Jan
	Assist Senior Vice President during budget creation for 2010	No cost	July
	Work with WSHA's accounting team for 2008 audit	No cost	April
<b>TOTAL COST</b>		<b>\$475.00</b>	

Reviewed and Agreed to contents of this plan.

Employee:

Date:

Supervisor:

Date:

HR:

Date