

# Santa Clara University Performance Document

The purpose of performance planning, management and review is to assure linkage and alignment between an individual's work and the department's goals which support the University's mission.

Name:  
 Position:  
 Department:  
 Supervisor:

## SECTION A: Purpose and Goals for the Position

State how the position responsibilities align with the department's goals and the University's mission.

## SECTION B: Position Responsibilities and Performance Plan and Results

Rate University obligations of employment (shown).

\*Use the following scale: **S**ignificantly exceeds, **O**ften exceeds, **A**lways meets, **R**egularly meets expectations, or **N**eeds improvement

<u>RESPONSIBILITY</u>	<u>PERFORMANCE EXPECTATIONS AND MEASURES FOR '15-'16 REVIEW PERIOD</u>	<u>'15-'16 RESULTS ACHIEVED</u>	<u>*PERFORMANCE ASSESSMENT</u>	
			SELF	SUPV.
<u>For All Employees</u> <ul style="list-style-type: none"> <li>Provide excellent service to internal and external clients/constituents</li> </ul>	<ul style="list-style-type: none"> <li>Provide accurate, timely, courteous service. Measured by feedback from relevant clients/constituents.</li> </ul>			
<ul style="list-style-type: none"> <li>Initiate discussions with supervisor and clients regarding performance goals, and expectations, and satisfactory delivery of service.</li> </ul>	<ul style="list-style-type: none"> <li>Clarify instructions and expectations. Measured by feedback from clients/constituents on effectiveness of work produced.</li> </ul>			
<u>For Supervisory Employees Only</u> <ul style="list-style-type: none"> <li>Set performance expectations, coach, and feedback to staff. Complete Performance Planning Process.</li> </ul>	<ul style="list-style-type: none"> <li>Discuss and clarify job goals and expectations and provide feedback and training on an ongoing basis. Measured by effectiveness of staff performance.</li> </ul>			

**SECTION B: Position Responsibilities and Performance Plan and Results (continued)**

List in priority order the 3 to 5 major duties for this position for the review period. Each should account for a significant portion of the individual’s work. Taken together, they should account for the whole job.

\*Use the following scale: Significantly exceeds, Often exceeds, Always meets, Regularly meets expectations, or Needs improvement

<u>RESPONSIBILITY</u>	<u>PERFORMANCE EXPECTATIONS AND MEASURES FOR '15-'16 REVIEW PERIOD</u>	<u>'15-'16 RESULTS ACHIEVED</u>	<u>*PERFORMANCE ASSESSMENT</u>	
			SELF	SUPV.
1.				
2.				
3.				
4.				
5.				

**SECTION C: Personal/Professional Development Plan**

List three development initiatives to be accomplished during the review period. Each should enhance the skills or competencies needed for performance.

<u>DESIRED COMPETENCY/ SKILL FOR '15-'16</u>	<u>ACTION PLAN '15-'16 WHEN/WHERE/HOW</u>	<u>RESULTS FOR '15-'16</u>
1.		
2.		
3.		

**SECTION D: Follow-up to Discussion(s) of Previously Identified Performance Concerns (if applicable)**

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**SECTION E: Employee and Supervisor's Comments**

Employee's Comments Midyear Review: Date \_\_\_\_\_

Supervisor's Comments Midyear Review: Date \_\_\_\_\_

Employee's Comments End of Year Review: Date \_\_\_\_\_

Supervisor's Comments End of Year Review: Date \_\_\_\_\_

**Annual Review Summary**

**First Review, Introductory Period Evaluation**

<input type="checkbox"/> Meets or exceeds performance expectations and sustaining or improving performance overall.	<input type="checkbox"/> Effective performance-continue employment
<input type="checkbox"/> Performance declining and/or needs improvement overall.	<input type="checkbox"/> Needs improvement-extend introductory period (consult HR)
	<input type="checkbox"/> Terminate employment (consult HR)

Employee's Signature:	Print Name and Employee ID Number:	Date:
Supervisor's Signature:	Print Name and Supervisor's ID Number:	Date:
Second Level Supervisor's Signature:	Print Name:	Date:

Date Received in Human Resources: \_\_\_\_\_