



Performance Planning and Development Annual Review Form

Use the tab key to move the cursor to gray areas and tables will automatically expand as information is entered. To access this form electronically, go to: <http://www.hr.wayne.edu/appraisals/>.

Employee Name	Banner ID #	Classification
School/College/Division	Department	

ACCOMPLISHMENTS OF POSITION DUTIES, TASKS, AND RESPONSIBILITIES

LIST DUTIES AND RESPONSIBILITIES IN ORDER OF PRIORITY. DOCUMENT EVALUATIONS BY PROVIDING COMMENTS ON PERFORMANCE WHICH BRIEFLY DESCRIBE THE ACCOMPLISHMENTS AND JUSTIFY THE LEVEL OF EVALUATION.

MAJOR DUTIES AND RESPONSIBILITIES (To be completed by employee) This list should not be considered a complete description of all employee's duties and responsibilities.	LEVEL OF PERFORMANCE (To be completed by supervisor) Indicate one of these ratings for each duty and responsibility: U L S F S E O (defined on last page)	COMMENTS ON PERFORMANCE (To be completed by supervisor) Should consist of a statement indicating results achieved; also may consist of comments indicating the employee's proficiency with job related skills

OTHER CONTRIBUTIONS

List contributions made by the employee or assets possessed by the employee in addition to those described above.



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Some of the following factors may not apply to all positions. When that is the case, check N/A. **If N/A is not provided, the factor MUST be evaluated.** For each defined element of job performance, place a mark within the appropriate appraisal rating box. The appraisal of each element of job performance should be followed by comments explaining the rating and recommending specific areas of improvement or development if necessary.

JOB/ORGANIZATIONAL KNOWLEDGE: Application of appropriate technical and procedural knowledge; understanding of facts and information related to or assignments, including department and University policies; degree of technical competence and demonstration of appropriate level of knowledge in specific field or discipline.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Unable to handle some job tasks	Fully Satisfactory <input type="checkbox"/> Satisfactory knowledge of job functions	Excellent <input type="checkbox"/> Handles new tasks with ease.	Outstanding <input type="checkbox"/> Able to adapt knowledge to complex problems
Supervisor's comments:				
PLANNING AND ORGANIZING: Setting objectives; establishing priorities; developing plans; arranging work schedules; meeting deadlines; anticipating problems; adapting to changes and using resources effectively; plan long and short range objectives; define goals and procedures; delegate work; follow-up to ensure work is completed.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Can plan routine tasks only	Fully Satisfactory <input type="checkbox"/> Plans/prioritizes full range of required tasks	Excellent <input type="checkbox"/> Plans/prioritizes with an emphasis on flexibility	Outstanding <input type="checkbox"/> Planning shows anticipation of potential problems
Supervisor's comments:				
PROBLEM ANALYSIS AND DECISION MAKING (Analytical abilities and judgment): Understanding factors and developing sound, practical and workable solutions; recognizing when a decision is necessary; asking for input; making decisions and providing information and feedback in a timely manner; accepting responsibility; facilitate problem resolution; willingness to make necessary and immediate decisions given incomplete information.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Decisions reflect basic analytical skills only	Fully Satisfactory <input type="checkbox"/> Decisions reflect full understanding of unit needs	Excellent <input type="checkbox"/> Recognizes need for and performs additional investigation to solve problems	Outstanding <input type="checkbox"/> Decisions show in-depth analysis and understanding
Supervisor's comments:				
HUMAN RELATIONS: Interacts effectively and maintains positive relationships with peers, subordinates, and customers; builds teamwork; motivates and inspires others; cooperates with persons outside of the department; willingly accepts instructions and assignments; assists others to accomplish work group objectives; develops confidence; uses positive reinforcement; treats people with respect.				
Unsatisfactory <input type="checkbox"/> Consistently rude to others. Frequent complaints from customers, co-workers, external clients, etc.	Less than Satisfactory <input type="checkbox"/> Fails to respond to needs of customers, employees, external clients, etc. An uncooperative working partner or team member. Makes little or no effort to provide good service	Fully Satisfactory <input type="checkbox"/> Provides prompt and effective service to customers and/or employees, external clients, etc. Cooperative, polite, and congenial at all times	Excellent <input type="checkbox"/> Frequently goes beyond performance standards to provide service and maintain relationships	Outstanding <input type="checkbox"/> Consistently exceeds requirements to anticipate the needs of customers and/or employees. Works harmoniously with others and is an example to all
Supervisor's comments:				
COMMUNICATION SKILLS: Display of oral and/or written communication skills required by job; ability to listen and understand information; present information in a clear and concise manner.				
Unsatisfactory <input type="checkbox"/> Information and ideas are consistently poorly organized and difficult to follow. Poor communication has created serious misunderstandings	Less than Satisfactory <input type="checkbox"/> Oral and written communications are frequently unclear and disorganized and/or contain grammatical and structural errors. May fail to communicate information on a timely basis	Fully Satisfactory <input type="checkbox"/> Can summarize data and/or ideas into understandable thoughts in oral and written form to meet position requirements. Actively listens when communicating with others. Usually uses appropriate sentence structure, grammar, spelling, and punctuation. Writes effective complete documentation	Excellent <input type="checkbox"/> Communications are effective, well organized, clear, and concise. Orally presents information in an articulate and convincing manner. Grammar, spelling, punctuation, and vocabulary are consistently correct.	Outstanding <input type="checkbox"/> Communications are exceptionally effective, timely, well organized, articulate, concise, and appropriate. Meetings and/or presentations are well organized, professionally executed, and highly effective



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Supervisor's comments:				
QUALITY OF WORK: Accuracy, thoroughness, and efficiency of work regardless of volume; ability to meet standards of quality.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Performs only minimally acceptable work	Fully Satisfactory <input type="checkbox"/> Assignments are complete and thorough	Excellent <input type="checkbox"/> Work shows high quality and expertise	Outstanding <input type="checkbox"/> Consistently thorough and documented beyond what is required
Supervisor's comments:				
PRODUCTIVITY/ACCOMPLISHMENT: Accuracy, thoroughness, and general effectiveness of regularly produced work; may include speed and consistency of output and volume of acceptable work.				
Unsatisfactory <input type="checkbox"/> Insufficient for most situations	Less than Satisfactory <input type="checkbox"/> Does less than is expected; work is not thorough or well thought out	Fully Satisfactory <input type="checkbox"/> Work is complete; work is regularly produced at an acceptable level	Excellent <input type="checkbox"/> Consistently produces work which more than meets normal job requirements	Outstanding <input type="checkbox"/> Generates thorough and well documented work; work far exceeds established requirements
Supervisor's comments:				
DEPENDABILITY: Attendance (disregarding FMLA protected absence) and punctuality; reliability; meets established schedules and deadlines, including assigned work hours; demonstrates commitment to department and University goals; attends to detail; follows-up on progress of work; follows instructions and appropriate procedures; fulfills responsibilities; maintains confidentiality as appropriate.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Sometimes unreliable; does not respond in a timely manner to requests; requires more than normal supervision	Fully Satisfactory <input type="checkbox"/> Reliable; responds quickly to requests; fulfills responsibility; needs only expected levels of supervision	Excellent <input type="checkbox"/> Very reliable; typically makes sound decisions; very resourceful; acts independently; requires little supervision	Outstanding <input type="checkbox"/> Extremely reliable; consistently makes sound decisions; makes creative contributions; justifies utmost confidence; works independently
Supervisor's comments:				
PROFESSIONAL DEVELOPMENT: Learns appropriate new work-related skills and procedures; works to develop professionally, growing in professional skills and knowledge.				
Unsatisfactory <input type="checkbox"/> Does not develop professionally	Less than Satisfactory <input type="checkbox"/> Works toward professional development to some degree	Fully Satisfactory <input type="checkbox"/> Works to develop professionally; continues to learn and grow	Excellent <input type="checkbox"/> Works to develop professionally to a considerable degree; typically seeks out new opportunities to learn appropriate new work-related skills and procedures	Outstanding <input type="checkbox"/> Works to develop professionally to a very high degree; continually challenging self to advance professional skills and knowledge; researches new learning sources and tools
Supervisor's comments:				
<input type="checkbox"/> N/A SUPERVISION AND DEVELOPMENT OF EMPLOYEES: Trains, guides, and assists employees; appraises and reviews performance of supervised employees in a timely, fair, and appropriate manner; motivates employees to perform effectively; recognizes and encourages employee development; maintains appropriate standards of performance; resolves personnel-related problems and issues in a timely and effective manner.				
Unsatisfactory <input type="checkbox"/> Fails to counsel and praise staff relative to performance; fails to follow-up and correct staff errors	Less than Satisfactory <input type="checkbox"/> Involved with staff only when necessary; may fail to follow-up and document employee performance; provides sporadic and ineffective training and counseling of staff	Fully Satisfactory <input type="checkbox"/> Actions show interest in subordinates; ensures training and appropriate cross training of staff; follows-up and document employee performance; provides praise and critical feedback; schedules assignments according to staff abilities and time constraints	Excellent <input type="checkbox"/> Motivates staff; develops specific procedures and formalized training methods including regular follow-up training; has developed performance standards; provides timely coaching and counseling with supportive documentation; adjusts staff schedules when needs and priorities change to effectively utilize resources	Outstanding <input type="checkbox"/> Successful with staff development and team building; develops the skills of all staff on a timely basis; effective coaching and counseling has led to performance improvements; provides effective, innovative training methods; consistently redistributes work and keeps staff functioning smoothly at peak performance levels
Supervisor's comments:				



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<input type="checkbox"/> N/A FISCAL MANAGEMENT: Prepare and/or maintain and operate within budget by controlling costs and keeping within prescribed limits; budgeting exhibits planning, flexibility, and responsibility given budgetary constraints. Record, analyze, monitor, develop, correct, and/or approve transactions, budgets and proposals in compliance with established policy and procedure.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks	Less than Satisfactory <input type="checkbox"/> Fails to consistently operate within budgetary constraints; record, analyze, monitor, develop, correct, and/or approve transactions, budgets and proposals in compliance with established policy and procedure	Fully Satisfactory <input type="checkbox"/> Consistently operates within budgetary constraints; records, proposals and transactions are current and in compliance with policy and procedure	Excellent <input type="checkbox"/> Budgets for new projects and basic operation in a cost effective and consistent manner; analysis and evaluation reflect complete understanding and command of the process including the non-routine	Outstanding <input type="checkbox"/> Budgeting shows exceptional planning, flexibility, and responsibility; actions are effective, accurate and indicate anticipation of future trends and difficulties
Supervisor's comments:				
<input type="checkbox"/> N/A INITIATIVE AND CREATIVITY: Resourceful to deviate from the routine; self-starter; develops and implements new methods, procedures, solutions, concepts, designs and/or applications of existing designs or procedures; accepts additional challenges and willingly assists others; self-reliant; demonstrates imagination, originality, and self-motivation; makes innovative and/or productive contributions; responds to changing requirements and meeting changing technical business needs; flexibility and adaptability.				
Unsatisfactory <input type="checkbox"/> Insufficient for most tasks and situations	Less than Satisfactory <input type="checkbox"/> Needs detailed instructions to handle tasks; makes some effort to change if directed	Fully Satisfactory <input type="checkbox"/> Assists in generating new approaches; responds well to change	Excellent <input type="checkbox"/> Self-starter in developing new ideas; resourceful in improving work methods	Outstanding <input type="checkbox"/> Ideas display innovation, resourcefulness and imagination in improving work methods
Supervisor's comments:				
<input type="checkbox"/> N/A AFFIRMATIVE ACTION AND EEO COMPLIANCE: Meets affirmative action responsibilities by monitoring unit employment practices to support the University efforts in meeting its diversity goals and ensure compliance with the law and University policy; supports, enforces and adheres to the University's policies for non-discrimination and a harassment free workplace.				
Unsatisfactory <input type="checkbox"/> Consistently fails to meet responsibilities; repeated non-compliance with University policy	Less than Satisfactory <input type="checkbox"/> Unable to fully meet responsibilities; requires frequent assistance and direction in meeting goals and observing University policy	Fully Satisfactory <input type="checkbox"/> Meets responsibilities; participates in goals setting; willingly and consistently in compliance with University policy	Excellent <input type="checkbox"/> Actively organizes, plans and develops goals; knows and correctly applies University policy; consistently seeks additional information and knowledge	Outstanding <input type="checkbox"/> Takes initiative in setting and meeting goals; develops new approaches, and generates new ideas in meeting goals and observing University policy; consistently recognizes and responds to situations that affect goal attainment
Supervisor's comments:				

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OVERALL PERFORMANCE RATING

Evaluate the employee's overall level of performance in the accomplishment of major duties and responsibilities, other contributions, quality of service, and other job related performance factors. **An overall performance rating of Unsatisfactory or Outstanding MUST be supported with a written attached justification.**

Unsatisfactory <input style="width: 20px; height: 15px; margin: 0 auto;" type="checkbox"/>	Less than Satisfactory <input style="width: 20px; height: 15px; margin: 0 auto;" type="checkbox"/>	Fully Satisfactory <input style="width: 20px; height: 15px; margin: 0 auto;" type="checkbox"/>	Excellent <input style="width: 20px; height: 15px; margin: 0 auto;" type="checkbox"/>	Outstanding <input style="width: 20px; height: 15px; margin: 0 auto;" type="checkbox"/>
<p>Employee has had a reasonable period of time (initiated by a documented evaluation of Less than Satisfactory) to improve performance. Employee continues to fail to accomplish assigned position duties and/or continues to use job-related skills in an inadequate manner. Upon consultation with appropriate Human Resources or labor Relations representative, the employee will either be demoted or terminated.</p>	<p>Overall performance indicates the employee fails to accomplish assigned position duties and/or uses job-related skills in an inadequate manner; requires an inordinate amount of direct supervision in order to produce work of acceptable quality and quantity. The employee may possess the talent to earn a higher rating if special training and coaching is given or if the employee is transferred to another more suitable position</p>	<p>Overall performance is characterized by acceptable quality and quantity of work in accomplishment of position duties; uses job related skills in an acceptable manner; requires a degree of supervision that is typical for the position</p>	<p>Overall performance is characterized by high quality and quantity of work in the accomplishment of position duties; uses job-related skills in more than acceptable manner; requires a degree of supervision that is somewhat less than typical for the position.</p>	<p>Overall performance is characterized by exceptionally high quality and quantity of work in accomplishment of position duties; assumes responsibilities which are beyond the position requirements; uses job-related skills in an exceptional manner; requires substantially less supervision than typical for the position.</p>
<p>Supervisor's comments:</p> <div style="border: 1px solid black; height: 200px; margin-top: 5px;"></div>				



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Employee Development Plan Form

Employee Development Plan: Identify and schedule appropriate classes and/or professional associations, conferences, on the job training, work experience and other developmental resources.

Professional and Personal Development (Complete at Beginning of Performance Year)	Actual Progress (Complete Throughout Performance Year)

Employee Signature: _____
(Copy given to employee)

Date: _____

Supervisor Signature: _____
(Copy given to supervisor)

Date: _____

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SIGNATURES:

Completed by Immediate Supervisor

Date

1st Level Reviewer

Date

Employee comments (optional – may include discussion of professional development plans and objectives):

Employee's Signature

Date

Your signature does not necessarily mean that you agree with this review; it is only to acknowledge that your supervisor has met and reviewed it with you.

☐ **I WISH TO REVIEW MY OVERALL RATING FURTHER**

Check box if employee significantly disagrees (feels there is a one level or greater rating discrepancy) with the overall rating. If box is checked, employee must complete comments section and include additional supporting documentation. The review materials will be forwarded to the 1st Level Reviewer for rating consideration. 1st Level Reviewer may take actions to arrange to resolve rating discrepancy and respond back to employee.

Employee Signature

Date

1st Level Reviewer should check the appropriate box and sign to acknowledge that the performance appraisal document was received for further rating consideration. Reviewed document is to be returned to employee and immediate supervisor.

☐ **Reviewed and Re-affirmed**

☐ **Further Action Necessary**

1st Level Reviewer Signature

Date