

## Beloit College Supervisor Performance Review & Development Plan

<b>Employee Name</b>	<b>Position Title</b>	<b>Review Date</b>
<b>Supervisor Name</b>	<b>Department</b>	

### Purpose

The purpose of this process is to facilitate dialog about individual performance expectations and accomplishments guided by departmental and individual objectives. Neither the form nor the meeting is meant to replace regular, ongoing feedback. However, it does provide a formal opportunity for employees to be involved in the assessment of their work, their future development and improving job and/or departmental work processes. The form is designed to help you reflect on and prepare for a discussion around:

- understanding the duties and responsibilities of the position,
- how the position contributes to the mission of the department and the department contributes to the mission of the college,
- individual performance of duties and whether that performance contributes to supporting a positive and productive campus culture ,
- opportunities for individual learning and development, and
- setting goals and objectives for the coming year.

### General Instructions

1. Each performance evaluation should begin with a review of the job description and comparison to the job duties and responsibilities regularly performed by the individual holding the position.
2. Supervisors will complete the supervisor form and employees will complete a self-evaluation form.
3. Supervisors will schedule an appointment with each employee for a performance evaluation meeting. Those involved should plan for uninterrupted time lasting between 30 minutes to 1 hour.
  - a. Supervisor will lead discussion of employee’s strengths and areas for growth and improvement, providing examples of performance.
  - b. Both supervisor and employee should ask questions to clarify information that they do not completely understand; open, two-way communication is important.
  - c. Supervisor and employee agree upon goals for the following year.
4. Performance evaluations will be completed annually. Completed forms are to be submitted to the Human Resources Office by May 31 of each year and will become part of the employee’s personnel file.
5. If the job description requires changes, supervisor sends them via email to Heather McLean at [mcleanh@beloit.edu](mailto:mcleanh@beloit.edu), with changes tracked or highlighted.

**Part 1: Review Job Description** – Responsibilities and duties should be listed in order of priority of the task and amount of time spent performing the task. Significant changes to job descriptions must be reviewed and approved by Human Resources.

Are there any significant changes to the job description? No  Yes

**Part 2: Contribution to Mission** – At Beloit College, every position contributes to the College’s mission. Individually, these contributions may vary, some by direct connection with students, others by supporting programs, activities or operations that enhance the student experience. Please briefly describe 1-2 of the most important contributions your position has made this year in supporting the critical functions and goals of the department and, in turn, the mission and business of the college.

**Beloit College engages the intelligence, imagination, and curiosity of its students, empowering them to lead fulfilling lives marked by high achievement, personal responsibility, and public contribution in a diverse society. Our emphasis on international and interdisciplinary perspectives, the integration of knowledge with experience, and close collaboration among peers, professors, and staff equips our students to approach the complex problems of the world ethically and thoughtfully.**

**Part 3: Review of Goals from Last Review Period**

List progress on goals from prior review period:

**Part 4: Key Essential Functions** – In the boxes below identify 2-3 key essential functions of the position. These should be items selected from or directly linked to the job description. List the employee’s accomplishments for the key essential functions. Give specific examples or evidence about performance of the function and/or an improved a process or service related to the function. Also list any work process, skill or behavioral improvements the employee could focus on to help perform a function that contributes to the individual or departmental objectives. If you believe there are obstacles to the employee’s effective performance (e.g. resources, systems, or processes), list them along with ideas for improvement.

Tips for a good discussion: 1) If differences exist between employee and supervisor forms, discuss why. Are the use of time and other resources best aligned with the position? With departmental objectives? 2) Discuss obstacles to effective work performance (e.g. resources, systems, or processes that affect employee’s work). 3) If applicable, discuss current best practice and/or possible work process improvements. Employees are often the best source of ideas for improvement.

Key Essential Function	Accomplishments	Focus for Improvement
Key Essential Function	Accomplishments	Focus for Improvement
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**Part 5: General Performance Expectations** - General performance includes the evaluation of the knowledge, skills and abilities specific to the duties of the job. Using the definitions below, rate the performance levels of the staff member for each of the items listed. *Comments and examples should be used to support your ratings and as an aid to assist discussion of performance development or improvement.*

- **B = Below Expectations** – Performance frequently falls short of expected contributions given the level of experience, expertise or skill. This may be due to learning new duties or could mean performance has declined.
- **P = Partially Meets Expectations** – Performance frequently meets minimum expectations, but often falls short of performance standards or desired results. This may be due to learning new duties or could mean performance has declined.
- **F = Fully Meets Expectations** – Performance consistently meets relevant standards for position. Applies education, technical and interpersonal skills effectively, including initiative and engagement with coworkers and others.
- **E = Exceeds Expectations** – Performs consistently at a level above relevant performance standards. Often exceeds expectations for contributions while consistently applying initiative, engagement and a positive attitude.

Performance Expectation		Performance Rating
<p><b>Job Knowledge and Process Management:</b> Applies knowledge and experience related to job in accomplishing tasks. Actively sets priorities and adjusts to unscheduled situations when necessary. Effectively uses technology to accomplish work. Problem solves and reviews processes periodically for continuous improvement.</p>		B <input type="checkbox"/> P <input type="checkbox"/> F <input type="checkbox"/> E <input type="checkbox"/>
Comments and Examples:		
<p><b>Customer Satisfaction:</b> Works to inspire trust and confidence of others. Responds courteously and promptly to internal and external customers. Maintains confidentiality and uses discretion when handling customer-related matters. Produces the required volume and quality of work while maintaining customer satisfaction at targeted levels.</p>		B <input type="checkbox"/> P <input type="checkbox"/> F <input type="checkbox"/> E <input type="checkbox"/>
Comments and Examples:		
<p><b>Planning and Organizing:</b> Establishes and is guided by both short- and long-term plans to meet departmental and institutional objectives. Shows foresight in recognizing problems. Uses sound judgment to establish and achieve deadlines.</p>		B <input type="checkbox"/> P <input type="checkbox"/> F <input type="checkbox"/> E <input type="checkbox"/>
Comments and Examples:		
<p><b>Resource Management:</b> Manages or uses the financial resources of the department effectively and efficiently. Effectively uses other resources, such as space, budget, supplies and equipment, to achieve results.</p>		B <input type="checkbox"/> P <input type="checkbox"/> F <input type="checkbox"/> E <input type="checkbox"/>

<b>Comments and Examples:</b>	
<p><b>Human Resource Management:</b>  <b>All</b> - Effectively monitors own performance. Elicits support and cooperation from others. Takes individual initiative or facilitates teamwork as appropriate.</p> <p><b>Supervisors – (Complete only when employee is responsible for supervising other employees.)</b> Actively communicates a clear sense of the direction and mission of the department or division. Delegates responsibilities to promote growth and development. Provides appropriate recognition opportunities. Responds to employee concerns in a timely and effective manner. Effectively informs staff of policies and procedures. Effectively monitors employee performance, reviews turnover and recognizes areas for improvement.</p>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p>
<b>Comments and Examples:</b>	

**Part 6: Performance Values and Behaviors** – As employees of the College, we model the following values and behaviors to support and reinforce a positive and productive performance culture. Using the definitions below, select the rating of your performance values and behavior levels for each of the areas listed. *Comments related to values and behaviors can be added under each section.*

- **B = Below Expectations** – Performance frequently falls short of expected contributions given the level of experience, expertise or skill. This may be due to learning new duties or could mean performance has declined.
- **P = Partially Meets Expectations** – Performance frequently meets minimum expectations, but often falls short of performance standards or desired results. This may be due to learning new duties or could mean performance has declined.
- **F = Fully Meets Expectations** – Performance consistently meets relevant standards for position. Applies education, technical and interpersonal skills effectively, including initiative and engagement with coworkers and others on campus.
- **E = Exceeds Expectations** – Performs consistently at a level above relevant performance standards. Often exceeds expectations for contributions while consistently applying initiative, engagement and a positive attitude.

Values and Behaviors	Performance Rating
<p><b>Excellence/Process Improvement:</b></p> <ul style="list-style-type: none"> <li>○ works diligently and energetically towards making the student experience at Beloit College as excellent and seamless as possible.</li> <li>○ stays focused on promoting the mission and business of the college.</li> <li>○ follows professional standards for our jobs and within our field or discipline.</li> <li>○ actively seeks to learn and enhance individual skills to improve work processes.</li> <li>○ contributes to and supports positive change that helps the College meet institutional goals.</li> </ul>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>Comments:</b></p>

<p><b>Teamwork and Collaboration:</b></p> <ul style="list-style-type: none"> <li>○ seeks to collaborate and partner whenever it promotes the mission and business of the college.</li> <li>○ conducts work across departments and divisions showing a willingness to help others and resolve problems promptly in a positive, supportive and objective manner.</li> <li>○ actively seeks communication strategies that promote and enhance teamwork.</li> <li>○ understands that promoting the mission of the college may require that we sometimes go beyond our formal job descriptions.</li> </ul>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>Comments:</b></p>
<p><b>College Citizenship:</b></p> <ul style="list-style-type: none"> <li>○ promotes and supports an environment where diverse perspectives are valued and developed to promote common goals and inclusiveness.</li> <li>○ respects individuals for their contributions when we agree and when we disagree.</li> <li>○ promotes a safe work environment.</li> <li>○ approaches our work seriously, but also with a sense of humor and appreciation for those with whom we work.</li> </ul>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>Comments:</b></p>
<p><b>Integrity:</b></p> <ul style="list-style-type: none"> <li>○ is committed to the highest ethical standards, including promoting the college's mission diligently and responsibly.</li> <li>○ conducts business with financial honesty and accountability.</li> <li>○ acts with transparency (where appropriate) and confidentiality (where appropriate).</li> <li>○ shows respect one another.</li> </ul>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>Comments:</b></p>
<p><b>Innovation:</b></p> <ul style="list-style-type: none"> <li>○ attempts to be a creative, resourceful, and proactive problem solver as we go about our work with a focus toward improving departmental performance by resolving and preventing problems.</li> <li>○ uses our knowledge and skills to recognize the value of alternative resources.</li> </ul>	<p><b>B</b> <input type="checkbox"/> <b>P</b> <input type="checkbox"/> <b>F</b> <input type="checkbox"/> <b>E</b> <input type="checkbox"/></p> <p><b>Comments:</b></p>

**Part 7: Individual Goals and Development Planning for Next Review Period – see last page**

Goals should be developed collaboratively between supervisor and employee and should align with departmental and College goals. The form and discussion should include all resources necessary to complete the goals successfully. The Development Plan should include skill development such as mentoring, work with other departments or on-the-job training, as well as formal training or workshops.

The page summarizing Individual Goals and Development Planning for the next review period is detachable and should be used for periodic discussion and update throughout the upcoming year. Please include this page with the performance evaluation form and *retain a copy for your records*.

**Additional Comments (if not relevant in other areas of the form):**

**Employee:**

**Supervisor:**

**Signatures:** Your signature indicates that you have discussed job performance and does not necessarily indicate agreement.

**Employee Signature** \_\_\_\_\_ Date: \_\_\_\_\_

**Evaluator Signature** \_\_\_\_\_ Date: \_\_\_\_\_

**Supervisor:** Return evaluation forms with signatures to Human Resources. If the job description requires changes, send it via email to Heather McLean at [mcleanh@beloit.edu](mailto:mcleanh@beloit.edu) in Word format with changes tracked or highlighted.

**Individual Goals and Development Planning for Year**

Goals and Expected Outcomes	Development Plan	Supervisor Support	Anticipated Timeline and Follow-up Dates
			<b>Start Date:</b> <b>Follow-up Date:</b> <b>Follow-up Date:</b> <b>End Date:</b>
			<b>Start Date:</b> <b>Follow-up Date:</b> <b>Follow-up Date:</b> <b>End Date:</b>
			<b>Start Date:</b> <b>Follow-up Date:</b> <b>Follow-up Date:</b> <b>End Date:</b>

Signature indicating supervisor and employee have discussed above performance goals. If additional documentation or planning materials are relevant, please indicate additional document(s) here:

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date