

SHRA Career-Banded Work Plan & Annual Appraisal Form

This Work Plan and Appraisal covers the Annual Work Period ending March 31, _____ (YR). Period covered, if less than June 1 - March 31: _____

Employee Name _____ Employee ID _____

Working Title (for Dept use) _____ Career Banded Title _____

Assigned Competency Level of Position: Contributing Journey Advanced Length of Time in Current Position/Competency Level _____

SUPERVISOR: Complete this section during the *Work Planning Phase (within 30 days of date of hire or start of the work period)*

- 1. Is the position's most recent job description relevant and consistent with the work plan? Yes No- Contact HR Talent and Organizational Solutions
- 2. Are the currently-assigned competencies appropriate and consistent with the work plan? Yes No- Contact HR Talent and Organizational Solutions
- 3. Have the competencies required for this position been reviewed / updated within the last 3 years? Yes No- Contact HR Talent and Organizational Solutions
- 4. Date that you reviewed the assigned / expected competencies with the employee as part of the work plan for the current period: Date _____

Supervisor's Signature _____ Employee's Signature _____

Interim Appraisal

SUPERVISOR: Complete this section during the *Interim Appraisal Phase (between months 6 & 7 of the Performance Cycle)*

- 1. Is the employee demonstrating the assigned / expected key responsibilities as outlined in the work plan? Yes No, Improvement Plan on p. 3
- 2. Date that you met with the employee to provide interim appraisal feedback _____

Supervisor's Signature _____ Employee's Signature _____

Annual Appraisal

SUPERVISOR: Complete this section during the *Annual Appraisal Phase*

Supervisor / Manager Signature _____ Name (print) _____ Date _____

Next Level Signature (if annual rating will be a 1 or 2) _____ Name (print) _____ Date _____

Annual Appraisal Received (does not imply agreement) - Employee's Signature _____ Date _____

SHRA Career-Banded Work Plan & Annual Appraisal Form (cont.)

Key Responsibilities this Period

(Continue on Page 6.)

Critical Activity or Outcome

Results at Interim

Results at Annual Appraisal

SHRA Career-Banded Work Plan & Annual Appraisal Form (cont.)

Performance Improvement / Adjustments Needed (if applicable)

Results at Interim

Results at Annual Appraisal

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Training / Professional Development (if applicable)

Notes at Interim

Notes at Annual Appraisal

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Notable Accomplishments (if applicable)

Comments at Interim

Comments at Annual Appraisal

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Supervisor Comments

At Interim

At Annual Appraisal

Employee Comments

At Interim

At Annual Appraisal

Annual Performance Rating*

*SUPERVISOR: Select one of the following that describes the employee's overall performance during the **Annual Performance Cycle***

- Your performance is not meeting expectations. A performance improvement plan has been provided. Failure to demonstrate significant and sustained improvement will lead to separation from employment.

A performance improvement plan was provided on (date) _____

- While your performance has met expectations in some of this position's key responsibilities, other aspects will require changes in order to meet the expectations for the next performance cycle.

A performance improvement plan: was provided on (date) _____ OR

is being incorporated and attached to this evaluation as a separate document.

- Your performance has typically met or exceeded the expectations for this position's key responsibilities. Continued performance at this level should meet the expectations for the next performance cycle. Any suggested changes/improvements noted in this evaluation are intended to help you further enhance your performance during the coming performance cycle rather than to document substantive performance concerns.

- Your performance has demonstrated a consistently high level of accomplishment, meeting and often exceeding expectations for this position's key responsibilities. Continued performance at this level is appreciated and encouraged, and is expected to meet or exceed the expectations for the next performance cycle.

- Your performance during this work cycle was exceptional and is worth special recognition as a particularly noteworthy year of significant accomplishments, far beyond the regular expectations of this position in a typical performance cycle. This rating is not considered an "every year" (or even frequent) status, but is reserved to acknowledge particularly extraordinary accomplishments during the last performance cycle. Your continued performance at a consistently high level is appreciated and encouraged, and is expected to meet or exceed the expectations for the next performance cycle.

* For OSP reporting purposes, these ratings will be reported as 1, 2, 3, 4, 5 respectively and correspond directly to the rating definitions above.

Optional Page. Please continue from previous page(s) as necessary. Indicate from which page information is being continued.

