



## EMPLOYEE DEVELOPMENT /PERFORMANCE SUMMARY

**Employee Name:** \_\_\_\_\_ Review Period Start: (m/d/yy) \_\_\_\_\_  
**Date of Appraisal:** (m/d/yy) \_\_\_\_\_ Review Period End: (m/d/yy) \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Supervisor: \_\_\_\_\_  
 Department: \_\_\_\_\_ Hire **Date:** (m/d/yy) \_\_\_\_\_

### GENERAL INFORMATION

**The purpose of the review is to objectively determine how well an employee is performing in his/her present position and to provide an opportunity for our talent to develop their career at (company name). The review is based upon a consideration of all the major functions an employee performs throughout the entire review period.**

**\*\*\*\*Please ensure there is a direct correlation between the individual employee goals and the strategic goals of the company and our MISSION:  
 "TO SIMPLIFY COMPLEXITIES FOR EACH CUSTOMER"**

### SECTION 1: KEY RESPONSIBILITIES

**This section is a summary of employee performance and development based on the job description throughout the entire review period.**

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Does not consistently deliver on all aspects of her/his position description and expectations.	Demonstrating consistent signs of improvement in most aspects of his/her position.	Is a strong contributor and fully delivers on his/her position description and expectations.	Demonstrating above and beyond job descriptions in most aspects of his/her position.	Consistently exceeds expectations for contributing to (company name).
Is inconsistent with regard to having and showing a positive attitude.	Exemplifies behaviors from both category.	Works well with others on a consistent basis and maintains a positive attitude.	Exemplifies behaviors from both category.	Serves as a role model to others in performance, attitude, and in creating & maintaining strong, positive relationships both internally and externally (where applicable).

**PROVIDE EXAMPLES: Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.**

**CHOOSE STAGE: Choose the employee's stage of development during this review cycle.**

**Valued Contributor**



## EFFECTIVE COMMUNICATION

Effectively communicates using; written, oral, non-verbal, and active listening skills. Has the ability to clearly present an idea or concept so others understand, lets others speak, and engages productively in difficult conversations while upholding our ethical values.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee's stage of development during this review cycle. Valued Contributor

SAMPLE

## SECTION 2: CORE COMPETENCIES

**STEP 1:** Read the definition of each core competency.

**STEP 2:** Review the possible examples of behaviors that are reflective of each Healthsystems core competency.

**STEP 3:** Provide examples from monthly development tool, observations and conversations, throughout the entire development period, that represent the employee's performance related to each core competency.

**STEP 4:** From the drop down box, select the stage of development that best reflects the employee's performance development related to each core competency.

**Action Orientation:** **We do things fast and we are committed to getting it right.**

Initiating action with a drive to achieve and to be successful in whatever is attempted. Having high energy with a desire to stay productive and engaged.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
<p>Needs to be asked to take action;</p> <p>Gets stuck by problems and barriers.</p>	<p>Demonstrating consistent signs of improvement in most behaviors of this core competency</p> <p>Exemplifies behaviors from both category IN and VC.</p>	<p>Independently and consistently takes action.</p> <p>Is determined to find ways past hurdles within department/role.</p>	<p>Demonstrating above and beyond behaviors of this core competency.</p> <p>Exemplifies behaviors from both category of VC and DP.</p>	<p>Proactively identifies and organizes actions on key leverage points for organizational success</p> <p>Views challenges as opportunities and supports calculated risk-taking that grows the company.</p>

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee's stage of development during this review cycle.

**Valued Contributor**

**Customer Engagement: Exceptional service is our only option.**

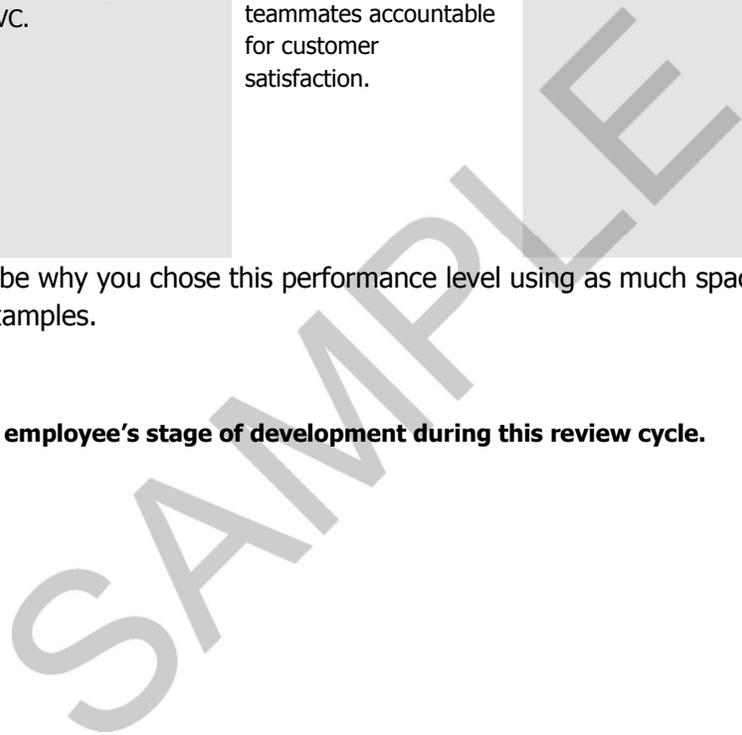
Engaging external customers and internal resources to achieve mutually beneficial outcomes in a way that provides an optimal experience for the customer.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Has received unsolicited or solicited negative feedback from internal and/or external customers.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Seeks first to understand and actively listens to what the customer wants/needs, and then provides them with a solution.	Demonstrating above and beyond behaviors of this core competency.	Expertly tailors customer engagement communications for both internal and external audiences on complex or difficult topics that require no revisions.
Does not regularly offer solutions or provides misinformation to internal/external customers.	Exemplifies behaviors from both category IN and VC.	Holds themselves and teammates accountable for customer satisfaction.	Exemplifies behaviors from both category of VC and DP.	Fully understands client needs and heads off possible consequences to the company by creating solutions for the client, customer, or company.

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**Valued Contributor**



**Flexibility: Responsiveness with expertise and composure.**

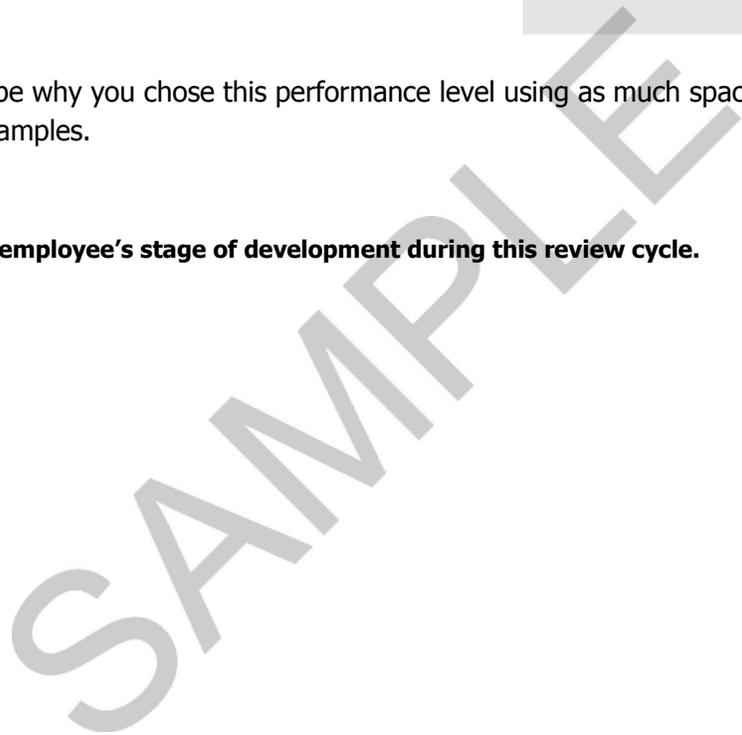
Adapting to changing demands and circumstances without difficulty while maintaining composure and effectiveness.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Withholds or inappropriately expresses input or concerns with changes.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Respectfully contributes input or concerns regarding changes, as appropriate.	Demonstrating above and beyond behaviors of this core competency.	Highly skilled at change management and facilitation.
Unwilling to quickly adopt changes.	Exemplifies behaviors from both category IN and VC.	Is quick to adapt to changes.	Exemplifies behaviors from both category of VC and DP.	Responds to changes by creating new opportunities for organizational success.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee’s stage of development during this review cycle.

**Valued Contributor**



**Interpersonal Effectiveness: The quality of every interaction matters!** Interacting well with others to achieve goals by productively managing conflict and confrontation.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Responds to work or personal conflict with either avoidance or aggressiveness.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Responds sensitively and effectively to conflict and confrontation.	Demonstrating above and beyond behaviors of this core competency.	Deals with conflict in such a way that results in trust building and strengthened relationships.
Inability to work well with others impedes or slows goal achievement.	Exemplifies behaviors from both category IN and VC.	Works well with others to achieve goals.	Exemplifies behaviors from both category of VC and DP.	Facilitates and role models the interpersonal skills needed to exceed goals.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee's stage of development during this review cycle.  
**Valued Contributor**

SAMPLE

**Character: We are defined by who we are and what we do.**

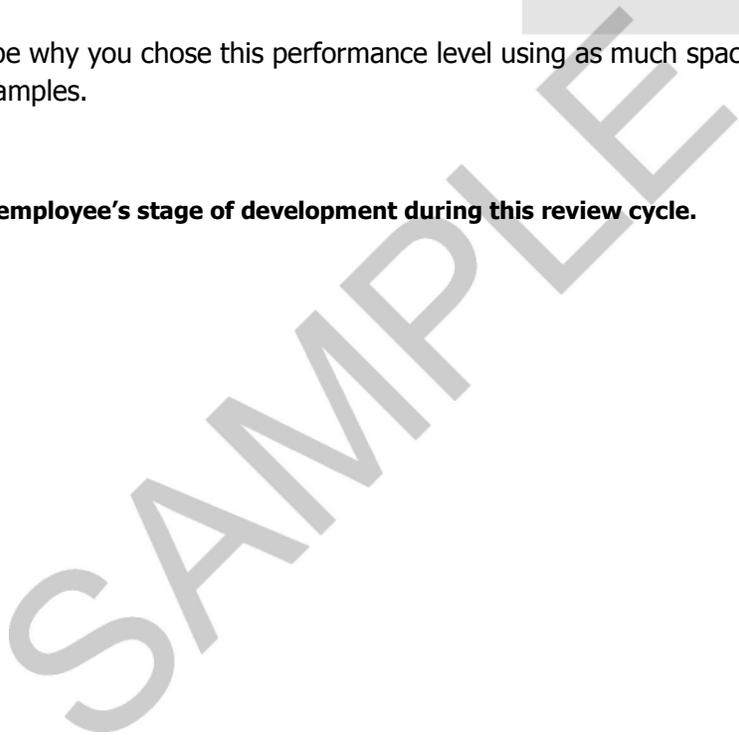
Attributes of ethical behaviors, high personal standards, and sound work ethic all employers should expect of employees.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Personal values do not align with organizational values.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Behaves consistently with clear personal values that complement those of the organization.	Demonstrating above and beyond behaviors of this core competency.	Consistently role models a value of acting for the greater good of the company.
Lacking in areas of preparation, timely follow-through or quality of work.	Exemplifies behaviors from both category IN and VC.	Knows the right thing to do and has the courage to do it.	Exemplifies behaviors from both category of VC and DP.	Consistently delivers under time and with a level of quality that exceeds expectations.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee’s stage of development during this review cycle.

**Valued Contributor**



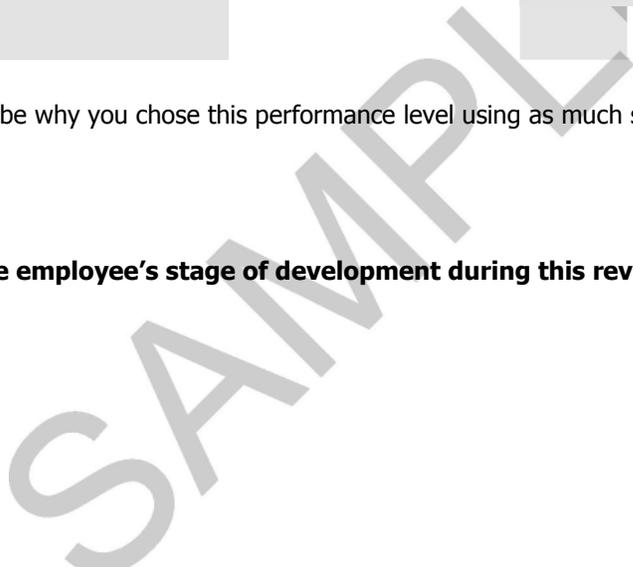
**Results Focus: We start with the end in mind.**

Taking a dynamic approach to work characterized by initiating decisions and actions. Concentrating on achieving the outcomes of a process or project while adhering to the overall strategy of the organization. Creating a culture of accountability and performance.

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Lacks in the effective prioritization of work.  Often unable to foresee and plan for potential barriers or problems.	Demonstrating consistent signs of improvement in most behaviors of this core competency  Exemplifies behaviors from both category IN and VC.	Uses time effectively and prioritizes well.  Identifies and organizes resources needed to accomplish tasks.	Demonstrating above and beyond behaviors of this core competency.  Exemplifies behaviors from both category of VC and DP.	Inspires enthusiasm in workgroup to understand and exceed expectations.  Innovative in resource maximization and collaboration across the organization to accomplish tasks.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee’s stage of development during this review cycle. Valued Contributor



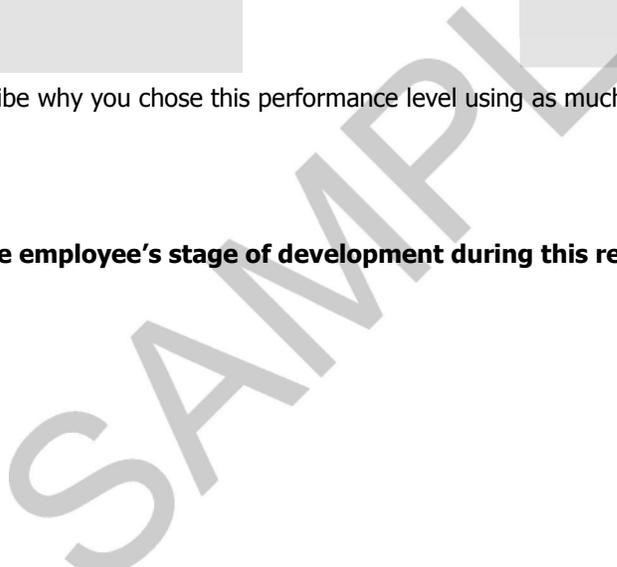
**Collaboration: We believe that diverse, committed people working together will change the world—or at least the industry!**

Understanding the importance of relationships to enable effective teamwork. Modifying personal style, focusing on the needs of others, and listening effectively to achieve desired outcomes for group endeavors.

Improvement Needed	Improvement	Valued Contributor	High Performer	Distinguished Performer
Places individual goals above team or organizational goals.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Aligns personal or team goals to organizational goals.	Demonstrating above and beyond behaviors of this core competency.	Establishes authentic and trusting relationships across the organization and at all levels that support resource and knowledge sharing to achieve results.
Disregards or criticizes the contributions of members of the workgroup.	Exemplifies behaviors from both category IN and VC.	Values the diverse strengths and views of team members.	Exemplifies behaviors from both category of VC and DP.	Facilitates a culture that values diversity.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee’s stage of development during this review cycle. Valued Contributor



## Leadership

Improvement Needed	Showing Improvement	Valued Contributor	High Performer	Distinguished Performer
Lacks ability to engage others in strategic vision and goals.	Demonstrating consistent signs of improvement in most behaviors of this core competency	Clearly communicates and supports individual/department goals in alignment with vision and strategic and goals.	Demonstrating above and beyond behaviors of this core competency.	Engages others in exceeding strategic goals by communicating an inspiring vision.
Does not actively engage with employees in regard to career development and opportunities for growth.	Exemplifies behaviors from both category IN and VC.	Encourages training and development.	Exemplifies behaviors from both category of VC and DP.	Formally and informally coaches and mentors others to engage in continuous development.

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee's stage of development during this review cycle. **Showing Improvement**

SAMPLE

## SECTION 3: OVERALL DEVELOPMENT STAGE SUMMARY

**PROVIDE EXAMPLES:** Describe why you chose this performance level using as much space as needed to provide specific, detailed examples.

**CHOOSE STAGE:** Choose the employee's stage of development during this review cycle. **Improvement Needed**

**Supervisor/Manager Overall Comments**

**Strategic Goals (By Department/ Organization)**

**Employee Personal Development Goals:**

**Employee Comments:**

**Signature of direct Supervisor:** \_\_\_\_\_ **Date:** (m/d/yy)

**Reviewed By: Signature:** \_\_\_\_\_ **Date:** (m/d/yy)

**Employee Acknowledgment:**

I have reviewed this document and discussed the contents with my manager. My signature means that I have been advised of my performance status and does not necessarily imply that I agree with the evaluation. I also acknowledge that we are an "At-Will" Employer and this performance appraisal in no way affects that employment relationship.

**Employee Signature:** \_\_\_\_\_ **Date:** (m/d/yy)