**<Enter Name of NSF>: Performance Review**

**Instructions**:

1. Quarterly, the employee and leader will jointly establish performance expectations/goals as well as a Personal Development Plan. (Sections 1 and 3).
2. Quarterly, the employee and leader will evaluate the employee’s performance against the value criteria (section 2).
3. The employee and leader will jointly monitor the progress of goals throughout the quarter and update them as necessary.
4. At the end of the review period, employees will provide their assessment of how they performed and forward it to their leader prior to the review meeting.
5. Leaders will also add their ratings and comments prior to the review meeting.

Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Leader: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 1. Performance Expectations/Goals**

Under “Performance goals”, list key deliverables for the role, including targets to be achieved, projects to be initiated or completed, etc. Where relevant, also include the steps the employee will take to achieve the expectations/goals. Identify when the goal is to be achieved under “Timing for completion”. Goals should be SMART – Specific, Measurable, Attainable, Realistic, Timely. Update the “Outcomes/Results” column with actual results.

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| **1. Performance Expectation/Goals** | **Timing for Completion** | **Outcomes/results** |
|  |  | **Employee Comments:**  Q1:  Q2:  Q3:  Q4:  **Leader Comments:**  Q1:  Q2:  Q3:  Q4: |
| **2. Performance Goals** | **Timing for Completion** | **Outcomes/Results** |
|  |  | **Employee Comments:**  Q1:  Q2:  Q3:  Q4:  **Leader Comments:**  Q1:  Q2:  Q3:  Q4: |
| **3. Performance Goals** | **Timing for Completion** | **Outcomes/Results** |
|  |  | **Employee Comments:**  Q1:  Q2:  Q3:  Q4:  **Leader Comments:**  Q1:  Q2:  Q3:  Q4: |
| **4. Performance Goals** | **Timing for Completion** | **Outcomes/Results** |
|  |  | **Employee Comments:**  Q1:  Q2:  Q3:  Q4:  **Leader Comments:**  Q1:  Q2:  Q3:  Q4: |

**Section 2. Values**

At the end of the period of time being reviewed, rate (use the ratings identified below) and provide comments on how the employee has demonstrated each of the values. Provide specific examples where appropriate.

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| **4** | Exceeded Expectations: Contributes beyond expectations. Performance involves some stretch beyond what is reasonably expected. |
| **3** | Met Expectations: Performance consistently meets all predetermined expectations. Individual successfully achieves what is required of them in their position. |
| **2** | Approaching Expectations: Individual achieves some of the expectations. Improvement in some areas is required. |
| **1** | Did Not Meet Expectations: Performance does not meet minimum standards or expectations. Immediate and sustained improvement required. |

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| **Criteria** | **Employee Rating** | **Leader Rating** | **Comments: how the employee demonstrates this value** |
| **Innovation:** Take appropriate steps to develop and implement new programs and services that are creative and cutting edge with an understanding that we will learn from our failures. |  |  |  |
| **Excellence:** Strive to achieve the highest standards of performance in all aspects of operating our business and in servicing our clients. |  |  |  |
| **Integrity:** Engage in relationships by acting fairly, honestly, truthfully and with a consistence of character. |  |  |  |
| **Respect:** Commit to engaging in relationships by seeking to understand each other without judgement. |  |  |  |

**Section 3. Learning & Development Goals / Personal Development Plan:**

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| **What are my Development Objectives?** | **Priority** | **What activities do I need to undertake to achieve my Objectives?** | **What support/resources do I need to achieve my Objectives?** | **Target Date** | **Actual Date** |
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| **Authorization/Signature (to be completed at the end of Q4)** | | | |  |
| Employee Signature: |  | Date: |  |
| Leader Signature: |  | Date: |  |