

**Office of Business and Finance  
Performance Planning and Review**



**Employee Name:**

**Dept./Unit:**

**Supervisor:**

**Period:**

**Performance Planning Date:**

**Coaching Session Date #1:**  
(suggested timeframe Nov-Dec)

**Coaching Session Date #2:**  
(suggested timeframe March-April)

**Performance Review Date:**

**Performance Objective & Results  
(Develop using SMART guidelines—See Attachment A)**

**University Strategic Goals:  
One University, Students First, Faculty and Staff Talent & Culture, Research Prominence, Outreach & Collaboration, Operation & Financial Soundness, and Simplicity**

The supervisor should be able to articulate, to the employee, the differences among the various levels of achievement at the time of the goal setting session.

**Objective #1:**

**Coaching Session 1 Comments:**

**Coaching Session 2 Comments:**

**Performance Review Comments and Result:**

**Rating:**  Exceeds  Meets  Does not meet

**Objective #2:**

**Coaching Session 1 Comments:**

**Coaching Session 2 Comments:**

**Performance Review Comments and Result:**

<b>Rating:</b>	<input type="checkbox"/> Exceeds	<input type="checkbox"/> Meets	<input type="checkbox"/> Does not meet
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**Objective #3:**

**Coaching Session 1 Comments:**

**Coaching Session 2 Comments:**

**Performance Review Comments and Result:**

**Rating:**     Exceeds     Meets     Does not meet

**Value Focus:**  
You are expected to demonstrate all University values. Select three values that will be a priority this year and explain how each is defined for the individual being rated. See Attachment B for descriptions and associated behaviors for each value.

**Rating Key:**  
Guiding: Leader in Modeling Behavior  
Demonstrating: Models Behavior on a Daily Basis  
Not Demonstrating: Does not Model Behavior on a Daily Basis

**Value:**

**Defined As:**

**Coaching Session 1 Comments:**

**Coaching Session 2 Comments:**

**Performance Review Comments and Result:**

**Rating:**     Guiding     Demonstrating     Not demonstrating

<b>Value:</b>	
<b>Defined As:</b>	
<b>Coaching Session 1 Comments:</b>	
<b>Coaching Session 2 Comments:</b>	
<b>Performance Review Comments and Result:</b>	
<b>Rating:</b>	<input type="checkbox"/> Guiding <input type="checkbox"/> Demonstrating <input type="checkbox"/> Not demonstrating

<b>Value:</b>	
<b>Defined As:</b>	
<b>Coaching Session 1 Comments:</b>	
<b>Coaching Session 2 Comments:</b>	
<b>Performance Review Comments and Result:</b>	
<b>Rating:</b>	<input type="checkbox"/> Guiding <input type="checkbox"/> Demonstrating <input type="checkbox"/> Not demonstrating

**Professional Development/Training:**  
Professional development/training goals should focus on values where the employee can influence others and/or values the employee needs to develop.

<b>Professional Development Goals:</b>
<b>Action Plan:</b>
<b>Progress:</b>

**Overall Rating:**  
Based on the Performance Objective & Values, select an Overall Rating (Exceeds, Meets, Does Not Meet)

<b>Rating:</b> <input type="checkbox"/> Exceeds <input type="checkbox"/> Meets <input type="checkbox"/> Does Not Meet
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*If selecting "Does Not Meet", please contact the B&F HR Service Center prior to issuance to discuss the performance improvement process for the employee.*

**Summary Comments:**

<b>Supervisor Comments:</b>
<b>Employee Comments:</b>

**Components and Signatures**

Signatures below indicate all sessions of the Performance Planning and Review took place on the dates specified on the front page of the document. Employee signature does not necessarily imply agreement.

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

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