This form is to be completed by the staff member and the supervisor and reviewed during the Performance Partnership (PP) meeting. Additional information and supplemental resources are located on the [Performance Partnership](http://performance.syr.edu) web page.

# Staff Information

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Staff Member Name** |  | **Supervisor Name** |  | **Performance Cycle** (Fiscal or Calendar Year) |  |
| **Staff Member SUID #** |  | **Supervisor SUID #** |  | **Performance Period Dates** |  |
| **Job Title** |  | **Department** |  | **Date of Review Meeting** |  |

# Section 1: Performance Evaluation – Review of previous SMART Goals and Listing of Future SMART Goals – Supervisor and Staff

* **Percent of Time and Major Responsibilities** – These should reflect what is recorded in your most recent job description, Position Evaluation Request (PER) or Performance Partnership form. If you need a copy of your PER or if the major responsibilities have changed, please email [hrcomp@syr.edu](mailto:hrcomp@syr.edu) for assistance.
* **Previous Established Goals, Staff Self-Assessment, and Supervisor Assessment** – List previously established goals (that were aligned with the major responsibilities) set for the review period being evaluated, and describe significant accomplishments, including progress on or success in meeting the established goals.
* **Future SMART Goals** - Review the major responsibilities of position and draft a total of 3 - 5 SMART goals for the coming year. For assistance in the creation of goals, reference the [SMART Goal](http://performance.syr.edu/wp-content/uploads/2017/03/SMART_Goal_Worksheet.docx) worksheet. Staff and Supervisor should review and finalize the SMART goals, as appropriate in the last column.

|  | **% of time** | **Major Responsibilities from the PER form** (Staff completes) | **Previous Established Goals** (Staff completes) | **Staff Self-Assessment of Accomplishments** | **Supervisor assessment of Staff Accomplishments** | **Future SMART Goals** (Staff and Supervisor complete) |
| --- | --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |
| 8 | 5 | Other position-related duties as assigned |  |  |  |  |
|  | 100 | Total |  |  |  |  |

# Section 2: Performance Evaluation Summary – Staff

Provide comments regarding your performance since your last review, including any relevant information, including any progress you have made toward improving your diversity, equity, inclusion, and accessibility competencies, e.g., participation in a related workshop, attendance at relevant lectures, panel discussions, or educational forums.

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# Section 3: Performance Evaluation Summary - Supervisor

Provide comments regarding the previous year’s performance, that support the overall rating, including your assessment of the staff member’s technical skills and behavioral competencies. For help, reference the [Competency Library](http://humanresources.syr.edu/careers/professional-development/performance-partnership/competency-library/) for a list and definitions of competencies and behaviors.

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# Section 4: Performance Rating - Supervisor

Evaluate the staff member’s overall performance relative to the expectations of the position and based on information documented in Section 1 by selecting ONLY ONE RATING. The summary text box in section 3, may be used to further support your overall rating. **For staff members who have been hired or have taken on a new position during the review period, please skip to the second table below.**

| **Performance** | **Rating** | **Performance Description** |
| --- | --- | --- |
|  | Exceeds Expectations | **Outstanding/Highly Effective Performance:**  Performance is continually and consistently superior in all major areas of responsibility.  Individual regularly performs at a level that is distinctly above and beyond what is expected.  Individual is an exceptional contributor whose performance exceeds expectations on a consistent and sustained basis. Individual is seen as a role model for others. |
|  | Meets Expectations | **Fully Successful/Effective Performance:**Performance consistently meets the critical requirements of the position and the high expectations.  Individual continually achieves preset goals. Incumbent’s performance is reliable and consistent in adding value to the work unit/department. |
|  | Does Not Meet All Expectations | **Partially Successful/Performance Improvement/Development Needed:**  Performance does not consistently meet or occasionally falls below what is required of the position; development and/or improvement in specific areas is required. |
|  | Below Expectations | **Unsuccessful/Unacceptable Performance:** Performance does not meet minimum expectations for this role, and immediate and sustained improvement is required.  ***Conversations with appropriate senior leadership and the Sr. HR Business Partner should occur prior to giving this rating*** |

**The review table below is only to be used for staff members who have been hired or have taken on a new position during the review period.**

| **Performance** | **Rating** | **Performance Description** |
| --- | --- | --- |
|  | Exceeds Expectations | Individual has assumed the new role with minimal direction, learns quickly and performs duties assigned in a way that exceeds expectations. Individual has taken on most or all of the core responsibilities of the position. |
|  | On Track | Individual is actively engaged and improving in the role through an effective learning process.  Individual performs most of the duties assigned in a way that meets expectations.  Individual listens well and seems to be taking the proper initiative. |
|  | Needs Improvement | Individual requires a significant amount of guidance and attention through the learning process or has been unable to perform the duties assigned in a way that meets expectations. Further improvement is needed. |

# Section 5: Professional Development – Staff and Supervisor

List professional development goals for the coming year. Professional development should reflect the knowledge, skills, abilities, and/or behavioral [competencies](https://performance.syr.edu/competency-library/) for professional and/or career growth and development. At least one goal should be related to diversity, equity, inclusion, and accessibility. For each professional development goal, indicate the actions to be taken to achieve the goal. Examples may include training, taking a specific class, or serving on a committee.

|  | Professional Development – what knowledge, skill, ability or competency will you gain or improve? | Action Plan – what specific steps will you take to achieve your goal? | Supervisor Support –what Resources are Available to support professional development? |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

# Section 6: Signatures

**Staff Member Acknowledgment:** I have reviewed this document with my supervisor. My signature indicates that I have read it and participated in these discussions but does not necessarily imply my agreement. Any additional comments or areas of disagreement are noted in the box below. I understand that, upon request, I may receive a copy of the final completed form.

|  |
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**Supervisor Additional Comments (optional) –** Provide any additional comments regarding performance and the expectations for the coming year.

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**Staff Member Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Staff Member Name (Please Print):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor Signature:**      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**Date:**      \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor Name (Please Print):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Once all signatures have been secured, save the document using the following convention, “Staff Member’s SUID Number\_Last Name\_First Name\_year” (e.g., 555555555\_Doe\_Chris\_2023), and email it to SU Human Resources at [performance@syr.edu](mailto:performance@syr.edu).