1199C Training and Upgrading Fund

Employee Performance and Self- Appraisal Form

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| Employee’s Name: | Department: |
| Job Title: | How Long In Position: |
| Date of Hire: | Review Period: from \_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_\_(date) |
| **Employee**: Please complete this page and Part I and II on the following pages and return this self - evaluation to your supervisor by \_\_\_\_\_\_\_\_\_\_.  Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments since the last performance review.  **Supervisors**: Please complete Part I through V of this form and return this appraisal to Human Resources following discussion with the employee. | |
| * List your most significant accomplishments or contributions since last year. How do these achievements align with the mission/goals/objectives of the Training Fund? * Since the last appraisal period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If so, please specify. * What activities have you initiated, or actively participated in, in an effort to encourage teamwork within the Training Fund? What was the result?      * To which of the following factors would you attribute your professional development since last year: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, other - please describe. * Describe areas you feel require improvement in terms of your professional capabilities. List the steps you plan to take and/or the resources you need to accomplish this. | |

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| Mission of the Training Fund | | |
| The District 1199C Training & Upgrading Fund is a labor-management partnership dedicated to:   * providing access to careers in healthcare and human services through education and life skills training * building the capacity of the Delaware Valley’s healthcare industry to create a high skilled workforce through the development of an educational pipeline that aligns with career ladder steps. | | |
| Our Commitment to Employees | | |
| The Training Fund is committed to providing fair and transparent processes around employee recruitment, development, training and promotion. We are committed to regular performance reviews for all levels of employees in our organization.  Each employee is entitled to a thoughtful and careful review. Performance review success requires both the supervisor's constructive and objective assessment, and the employee's willing response to constructive suggestions for improvement and to work with the supervisor to identify and overcome performance barriers. | | |
| **PERFORMANCE CATEGORIES-RATINGS**   1. Exceeds Expectations 2. Meets Expectations 3. Slightly below expectations, development expected 4. Does not meet expectations, action plan required | | |
| PART I-CORE PERFORMANCE CATEGORIES  ***(any rating less than “meets expectations “in either of the following three categories requires an immediate corrective action plan)*** | Self-Rating | Manager Rating |
| 1. Outcome Attainment (attains outcomes as prescribed by related grant or agency requirements) |  |  |
| 1. Documentation (ensures that required documentation and recordkeeping are completed timely as required by grant and agency) |  |  |
| 1. Agency Database (Timely and accurate entry of program data and/or providing information to ensure timely and accurate entry of program data (i.e. demographics, enrollment, completion, credential, job placement, transfer to post-secondary, etc., or as requested by grant agency.) |  |  |
| PART IA -PERFORMANCE CATEGORIES | Self-Rating | Manager Rating |
| 1. Job Knowledge (Capable and skilled in performing to the level expected for the job.) |  |  |
| 1. Technical Knowledge       (up-to-date on industry/discipline news, articles and best practices) |  |  |
| 1. Work Quality (Provides accurate, thorough, professional work timely) |  |  |
| 1. Organization and Planning (Organizes, plans and forecasts work skillfully to meet job needs) |  |  |
| 1. Analysis and Judgment (Analyses problems skillfully, uses logic and judgment to reach solutions) |  |  |
| 1. Initiative (Determines what needs to be done and works consistently to accomplish goals) |  |  |
| 1. Computer Skills      (i.e. MS Word & Excel, etc., the web) |  |  |
| 1. Teamwork (Coordinates own work with others, seeks opinions, values working relationships) |  |  |
| 1. Attendance & Punctuality (regularly present and punctual) |  |  |
| PART II-CORE COMPETENCIES | Self-Rating | Manager Rating |
| 1. Champions Mission (Understands and actively supports the mission and his/her role in Training Fund growth) |  |  |
| 1. Commits to Service (Dedicated to meeting expectations of customers. Maintains high standards of service for self and staff) |  |  |
| 1. Delivers Excellence (Can be counted on to meet goals, solution oriented, takes initiative and ownership of work) |  |  |
| 1. Accountable for Results (Achieves results by keeping commitments. Takes responsibility for actions, acts ethically and with integrity) |  |  |
| 1. Communicates Effectively (Communicates clearly and effectively in written and verbal form) |  |  |
| 1. Values Diversity (Contributes to a work environment in which individuals perceive that their uniqueness is respected and valued. Sees diversity as essential to Fund’s success) |  |  |

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| PART III – CURRENT GOALS  *Individual Goals related to Programs, Grants, Outcomes and Database Management during this assessment period* | | | |
| Goal #1: |  | | |
| *Exceeded goal\_\_\_\_ Met goal\_\_\_\_ Did not meet goal\_\_\_\_* | | | |
| Areas of growth and development | | | |
| Goal #2: |  | | |
| *Exceeded goal\_\_\_\_ Met goal\_\_\_\_ Did not meet goal\_\_\_\_* | | | |
| Areas of growth and development: | | | |
| Goal #3: |  | | |
| *Exceeded goal\_\_\_\_ Met goal\_\_\_\_ Did not meet goal\_\_\_\_* | | | |
| Areas of growth and development: | | | |
| PART IV- FUTURE GOALS  *Individual Goals related to Programs, Grants, Outcomes and Database Management for the upcoming assessment period* | | | |
| Goal #1: |  | | |
| Objective of the goal: | | | |
| Resources and support required (i.e., course work, other training, equipment or funding) | | | |
| Goal #2: |  | | |
| Objective of the goal: | | | |
| Resources and support required (i.e., course work, other training, equipment or funding) | | | |
| Goal #3: |  | | |
| Objective of the goal: | | | |
| Resources and support required (i.e., course work, other training, equipment or funding) | | | |
| Part V – OVERALL COMMENTS | | | |
| Supervisor's Overall Comments: | | | |
| Overall Rating: | | | Date: |
| Supervisor's Signature: | | |  |
| Employee's Comments: | | | |
| Print Employee’s Name: | |  | Date: |
| Employee's Signature**:\*\*** | |  | |
| Next Level Review | | | |
| Print Managers Name: | |  | Date: |
| Manager's Signature: | |  | |

*\*\*Acknowledges the receipt of copy of performance review and opportunity to respond only, does not indicate agreement or disagreement.*