**Add logo here  
Performance Management**

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| **Employee name** | **Hire date** | **Review date** |

## 

## **SHARED VALUES**

**Customer Service/Communication/Collaboration**

Committed to service and quality; delivers vital customer service; strives to exceed our customers’ expectations; puts our customers’ needs and desires above our own; measures our success by customer satisfaction. Emphasizes the need to deliver quality care and services; defines standards for quality and evaluates care, processes, and services against those standards; manages quality; improves efficiency.

Demonstrates candor, honesty, and forthrightness; expresses opinions willingly; values and respects the thoughts and opinions of others; shares our business objectives openly with our patients and stakeholders; has excellent listening skills. Identifies goals and vision for the team; guides individuals and groups toward priorities; coordinate resources and arranges organizational systems to meet objectives.

Favors a team approach; seeks feedback; builds consensus; values trust rather than control. Is willing and able to adjust to multiple demands, shifting priorities, ambiguity, and rapid change; shows resilience in the face of constraints, frustrations, or adversity. Attracts high caliber people; accurately assesses strengths and development needs of employees; gives timely, specific feedback and helpful coaching; provides development opportunities.

**Employee Rating:**

Excellent   Exceeds expectations   Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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**Accountability/Respect for Others/Ethical Standards**

Takes responsibility for work and actions; acts like owners; deliver on promises made; has a strong work ethic; takes pride in the work and achieving operational excellence. Sets high-performance standards; pursues aggressive goals and works efficiently to achieve them.

Respects others at all levels; develops and values relationships; engages with others; exhibits humility; is sensitive to the values inherent in community-based care; treats others fairly and with respect; strives for maturity in our dealings with others; is compassionate and caring toward others. Demonstrates ability to facilitate parties toward a “win-win” agreement; identifies key players; defines objectives, significant issues, and shared interests.

Seeks to do and say the right thing, striving to be trustworthy and honest. Respects confidentiality; adheres to a clear system of ethics, standards, and values; is ethical and responsible. Makes timely, cost-effective, and sound decisions; makes decisions under conditions of uncertainty.

**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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**Results/Energy**

Meet commitments and deadlines; approaches projects with stated goals and objectives; is decisive, assertive, and persistent when strong in the practice’s convictions; meets financial objectives. Challenges the status quo and champions new initiatives; acts as a catalyst of change and stimulates others to change; paves the way for needed changes; manages implementation effectively.

Demonstrates urgency; is fast-paced and active in our work; has a positive, can-do attitude; is self-motivated and a self-starter; approaches work with excitement; is energized by a desire to help others; works hard because our practice is passionate about its mission; takes ownership.

**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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**New Ideas/Analytical Thinking**

Welcomes new and different ways of thinking and working; constantly asks, “How can I make this better?”; values a spirit of continuous improvement; embraces technology and the efficiency it enables; is innovative. Handles day-to-day work challenges confidently; can adjust to multiple demands, shifting priorities, ambiguity, and rapid change; shows well-being in the face of constraints, frustrations, or adversity; demonstrates flexibility.

Understands complexity; is a problem-solver and an expert in our fields; learns from mistakes; makes informed decisions. Possesses up-to-date knowledge of the profession and industry; is regarded as an expert in the technical/functional area; accesses and uses other expert resources when appropriate.

**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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## **PROFESSIONAL DEVELOPMENT**

**Strengths**

Describe the area(s) of competence, skills, and behaviors demonstrated by this individual that will most contribute to this individual’s future success.

*Employee comments:*

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*Manager comments:*

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**Opportunities for Improvement**

Describe the area(s) of competence, skills, and behaviors that most need to be developed to enhance future performance and success.

*Employee comments:*

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*Manager comments:*

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**Career Interests & Aspirations**

What experiences, activities, and positions is this individual interested in for the future? If they aspire to grow in their current situation, what development opportunities would they like? Are there any skills or abilities the individual would like to improve or acquire?

*Employee comments*:

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*Manager comments*:

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**Development Action Plan**

Development actions to enhance performance and foster the individual’s growth. These may include job enrichment, expansion, development opportunities, special projects, coaching, training, and potential career movements or assignments over the next few years.

*Employee comments*:

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*Manager comments*:

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## **PERFORMANCE OBJECTIVES**

**Goal**

**Describe the individual’s goals and timeline:**

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**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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**Goal**

**Describe the individual’s goals and timeline:**

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**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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*Manager Comments:*

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**Goal**

**Describe the individual’s goals and timeline:**

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**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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**Goal**

**Describe the individual’s goals and timeline:**

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**Employee Rating:**

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*Employee Comments:*

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*Manager Comments:*

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**Goal**

**Describe the individual’s goals and timeline:**

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**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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## **Overall**

**Employee Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Employee Comments:*

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**Manager Rating:**

Excellent  Exceeds expectations  Achieves expectations  Below expectations  Needs improvement

*Manager Comments:*

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| **Employee signature:**  **Print name:**  **Date**: | **Manager signature:**  **Print name:**  **Date:** |

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