

Performance Development Plan



Appraisal Type (select one below):

New Employee

New Position/Transfer/Promotion

60 90 Days

Evaluation Period (enter dates below):

_____ to _____

Employee Name: _____

Current Position: _____

Supervisor: _____

PERFORMANCE FACTORS	NO	YES	N/A	COMMENTS (provide examples where employee met or did not meet standards)
Attendance: Does employee report to work when scheduled, on time and work entire shift?				
Job Knowledge: Does employee demonstrate having the level of knowledge required of the position to perform essential tasks and duties?				
Initiative: Does employee seek out information from supervisor, peers and other available resources to educate self on job duties, policies, procedures, processes, etc.?				

PERFORMANCE FACTORS	NO	YES	N/A	COMMENTS <i>(provide examples where employee met or did not meet standards)</i>
Interpersonal: Does employee interact in a professional, respectful, and civil manner with all members of the credit union?				
Communication: Does employee express ideas and provide information, both written and oral, in an effective manner that is thorough, clear, concise, and complete; convey information to supervisors, peers, and customers in a timely manner; listen to and accept feedback and suggestions from others?				
SUPERVISORY PERFORMANCE FACTORS <i>(if applicable)</i>				
Management/Leadership: Does employee create an environment of understanding, welcome feedback; give direction and communicate expectations; provide performance feedback; manage performance problems; understand, implement and comply with Credit Union policies and procedures; coach/counsel effectively, document critical incidents and is accessible to staff?				
Accountability: Does employee regularly review work and performance of assigned staff and take immediate action to correct problems or substandard work?				
Organization: Does employee plan and implement a realistic work schedule designed to meet deadlines and set expectations of staff that are appropriate for the job?				
Performance Management: Does employee set clear objectives and measures, monitor progress and results, and provide feedback, development, training, direction, coaching, and guidance in a supportive environment?				
Judgment/Decision Making: Does employee weigh and evaluate information, prioritize tasks, assess probable consequences and take appropriate action; demonstrate the ability to make sound and timely				

PERFORMANCE FACTORS	NO	YES	N/A	COMMENTS <i>(provide examples where employee met or did not meet standards)</i>
decisions and include appropriate people in the decision-making process and select alternatives that meet the objectives of the department and credit union?				

Has employee completed required compliance training? Yes No

Has employee completed the following training? Check all that apply: New Employee Orientation; Job/Department specific (list

Received copy and reviewed job description with supervisor? Other (list) _____

COMMENTS: *(List key success factors moving forward. Provide specifics required to meet performance expectations as well as timeframe to correct deficiencies, if applicable. Attach additional sheet(s) if needed.)*

MERIT Recommendation: Yes No Amount %

Supervisor Signature: _____ Date: _____

Employee Signature: _____ Date: _____

(My signature above indicates that I have reviewed and discussed this performance development plan with my supervisor)