

Template for
City of Milwaukee
Management Performance Planning & Review
Department Name Here

Employee:	ID#
Title:	Anniversary Date:
Department:	Appraiser:

Purpose	Date
Performance Planning	
Mid-Year Assessment	
Annual Review	

Key Job Responsibilities

List the most important tasks and duties for this position. Describe what the jobholder is expected to do — listed on job description. Provide feedback for each Key Job Responsibility (Distinguished Performance, Superior Performance, Fully Satisfactory, Needs Improvement, Unsatisfactory)

Key Job Responsibility	Appraisal Feedback

Competencies- Department Core Competencies.

(List 5 to 7) Competencies that the department has identified that it expects everyone to demonstrate at a superior level— behaviors, skills, technical knowledge, and abilities. (Sample competencies are listed below and may vary by department— additional sample competencies are available through Employee Relations)

Provide feedback for each Core Competency. (Always, Regularly, Sometimes, Rarely)

Competency	Description	Appraisal Feedback
Communication Skills	Presents ideas effectively in formal and informal situations. Conveys thoughts clearly and concisely. Listens well and asks good questions. Communicates well in writing. Keeps supervisor and coworkers informed. Shares complete and accurate information with others.	
Customer Focus	Knows his/her customers and can describe their expectations. Meets all of the expectations of both internal and external customers. Gains customers' trust and respect. Actively seeks customers' feedback on quality of service he/she provides.	
Diversity/ Interpersonal Skills	Deals effectively with a diverse workforce. Treats all people with dignity and respect. Always approachable, never rude. Accepts negative feedback as a way to learn. Is at ease with people at all levels. Aware of and sensitive to what other people are feeling. Does not belittle the opinions or work of other people, regardless of their status or position. Easy to get along with.	
Accountability	Accepts personal responsibility for the quality and timeliness of his or her work. Doesn't engage in behavior designed to justify and document decisions for self-protection purposes. Acknowledges and corrects mistakes. Doesn't make excuses for errors or problems.	
Ethics/Integrity	Respects and maintains confidentiality. Avoids rumor, gossip and subjective opinions in decision-making. Admits mistakes in spite of the potential for negative consequences. Presents unpleasant or disagreeable facts in an appropriate manner. Keeps promises; meets goals and deadlines. Avoids situations and associations that could be considered inappropriate. Honest in all dealings. 'A good role model.' Trusted by all.	
Results/ Achievement Orientation	Sets high goals and achieves them. Pays attention to his or her own performance and works to improve. Asks for feedback on performance and makes efforts to improve. Acts as if he/she believes that his/her actions make a real difference in meeting the needs of clients, customers, and fellow employees. Gets the job done. A consistent top performer.	

Competencies - Job-Specific Competencies.

Describes how the person goes about doing the job—behaviors, skills, technical knowledge, and abilities.
(Managerial/supervisory, professional/technical, administrative, etc.)

Provide feedback for each Job-Specific Competency. (Always, Regularly, Sometimes, Rarely)

Competency	Ideal Performance	Appraisal Feedback

Goals and Objectives

List activities that are beyond the specific tasks and duties outlined on the job description—Goals, Objectives and Projects. Connects the employee’s performance and the department’s mission, vision, and performance indicators.

Provide feedback for each Goal, Objective, or Project (Exceeded Expectations/Fully Met Expectations, Failed to Meet Expectations)

Description	Desired Outcome	Timeline	Appraisal Feedback

Achievements and Accomplishments

List the major accomplishments that the employee has been responsible for over the course of the year. Connects the employee's performance and the department's mission, vision, and performance indicators.

Description	Outcomes	Performance Feedback

Individual Development Plan

Consider the area to be developed, the benefit to the department and the employee, how to measure development, resources required, and a week-by-week implementation timeline.

Knowledge, Skill, Competency Desired	Method to Acquire (Training, Work Assignment, Mentoring)	Resources Required	Timeline

Overall Performance Feedback

- Superior Performance
- Fully Successful
- Needs Improvement
- Unsatisfactory

Employee Comments

Reviewer Signature: _____

Date: _____

Appraiser Signature: _____

Date: _____

Employee Signature: _____

Date: _____