

 <div style="text-align: center;"> PERFORMANCE DEVELOPMENT PLAN </div>			Institution / Department HSA Unit: HSA
Employee Name First & Last Name	Classification Title Program Operations Specialist – HSA Program Operations Specialist	Evaluation Period FROM 1/01/2014 TO 6/01/2014	Evaluation Date 6/15/2014
ORGANIZATIONAL IMPACT	<i>How does this position contribute to the stated mission and goals of the relevant HSA Unit? Builds capacity, develops and models best practices through training, tools</i>	<i>How does this position contribute to the UW mission? Improves and promotes an effective culture and adaptive, accessible models across HS units to support the educational, research and service mission, vision and values of the UW</i>	
PERFORMANCE FACTORS	Performance Expectations	Examples and Comments	RATING
Quality of work Competence, accuracy, thoroughness, across service profile.	<ul style="list-style-type: none"> Requirements, strategies, needs are understood Final best practices product applicable, technologically proficient Status of work/projects effectively communicated 	<ul style="list-style-type: none"> Scope clarified during onboarding and check-ins HSA SMT, HRC positive; survey feedback reviewed web-access, analytics tracked, positive comments PMP materials delayed; HSD meeting report-outs timely at 100% 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*
Quantity of work Use of time, volume of work accomplished, ability to meet schedules, efficiency and productivity levels.	<ul style="list-style-type: none"> Outcomes aligned with Strategy Map, JD focus 3 areas Work/projects reflect cross-organizational impact Effectively manages fluctuating volume and multiple projects per Focus 3 and 35-35-30 Emerging priorities clarified, planned, implemented 	<ul style="list-style-type: none"> Work product tracking demonstrates alignment with 3 6 of 9 HSA Units represented first quarter 20-50-30 reflects revisiting/rebalancing Routine work continued while absorbing new team member, Exec hire, IPE initiative and IT/AV migration, 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*
Job knowledge Degree of technical knowledge, understanding of job procedures, method and best practices.	<ul style="list-style-type: none"> Model attitude of continuous learning and process Improvement across JD Focus 3 Incorporates UW/HSA processes, industry best practices, field and survey feedback Actively develop subject matter expertise in client areas 	<ul style="list-style-type: none"> Consistently shares/ gathers knowledge with particular emphasis on training Analyzes, makes independent decisions to present for final review/approval (Qtr 3 Sup Trng exemplary) Created 3 units' BP Interviewing questions for bank 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*
Working relationships/Service Communication, cooperation and ability to work with supervisor, colleagues, co-workers, students and clients served.	<ul style="list-style-type: none"> Equally proficient with groups, 1:1, audiences Proactively and effectively communicate expectations, status, and challenges Professionally positive toward work/colleagues/clients 	<ul style="list-style-type: none"> Very proficient in 1:1 - audience; gaining exposure with HSD group and will transition to HSD presentations Models EC tools for HSA All-Hands with positive result Respectful, positive; effective w/challenging individuals 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*
Leadership and/or Supervisory skills Leadership skills across activity scope. Training, directing and/or evaluating subordinates and/or teams, delegation, planning and organizing work, problem solving, decision-making ability, ability to communicate effectively.	<ul style="list-style-type: none"> Professionally represents HSA to units, UW, partners, public Problem solver – analysis to effective implementation Effectively plan to accomplish goals, communicates roles, expectations, status, needs, success 	<ul style="list-style-type: none"> Increasingly recognized as respected, trusted trainer, facilitator, collaborator (see feedback results) Recognized trends in PDP compliance, led work group to successful resolution; empowered members Sought as team member; active listener, collaborator with noted and appropriate discretion and judgment 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*
Alignment and progress with Unit Mission, Values, Strategies	<ul style="list-style-type: none"> Elevates capacity of team Communicates OD services/resources, tracks needs Advance collaboration, cooperation & compliance 	<ul style="list-style-type: none"> Creates/integrates focused, effective tools, training (PDP initial roll-out, EPP comms) Weekly interactions scheduled, website updates 3/wk Work groups, HSA/cross-unit cooperation, PDP roll-out 	<input type="checkbox"/> Exceeds expectations* <input checked="" type="checkbox"/> Meets expectations <input type="checkbox"/> Needs improvement*

*Provide specific examples of this employee's performance

DEFINITIONS OF PERFORMANCE RATING CATEGORIES

Exceeds Expectations* – The employee regularly works beyond a majority of the performance expectations of this factor and has made many significant contributions to the efficiency and economy of this organization through such performance

Meets Expectations – The employee has met the performance expectations for this factor and has contributed to the efficiency and economy of this organization.

Employee Name First & Last Name	Classification Title POS – HSA ODS	Evaluation Period FROM 1/01/2014 TO 6/01/2014	Evaluation Date 6/15/2014
1. SPECIFIC ACHIEVEMENTS (Attach additional sheets if necessary) <ul style="list-style-type: none"> A. 4 HSA Units trained to PDP process under accelerated timeline B. Leveraged UWMC contacts to provide subject matter expertise to HSA re: Lean Project and AV Training Equipment C. Qtr 3 Supervisor Training requested for regional conference (attachment B) D. <i>Pending – from employee</i> <ul style="list-style-type: none"> ➤ Employee continues to add to her UW-HSA knowledge base while meeting tasks and responsibilities identified in her JD, HSA Strategy Map and HSA Roadmap. She is developing into a trusted, reliable and responsive resource and represents HSA consistently and capably. She demonstrates increasing capabilities across the 3 focus areas (metrics C) while modeling the HSA Values. 			
2. PERFORMANCE GOALS FOR THE NEXT EVALUATION PERIOD <ul style="list-style-type: none"> A. 2014-2015 Quarterly Supervisor Training available, scheduled and communicated by 8/01/14 B. Presenting data, condensed training modules at HS Directors' bimonthly meeting by 11/18/14 (attachment D) C. Actively participates in HSA Lean IT Project; role identification by 7/01/14 D. Lead HSA website supervisor tools re-design and roll-out by 12/01/14 <p>➤ Supervisor will assist in developing quarterly goals, meeting weekly for check-ins, weekly all-team discussion and daily for operational issues.</p>			
3. TRAINING AND DEVELOPMENT SUGGESTIONS <ul style="list-style-type: none"> A. F2 Lean Training completed by 10/01/14 B. Attend WA State Lean Transformation Conference and leverage reports 10/30/14 C. Advanced PowerPoint Training (negotiate timeline) D. <i>Pending - from employee</i> 			
4. ATTENDANCE (Supervisor's Comments) <ul style="list-style-type: none"> • Plans and notifies appropriately. Delegation is consistently aligned with HSA protocol. Access to ODS resources available. • As .5FTE, maintained prof. staff flexibility to meet organizational needs 			
RATER'S NAME (<i>supervisor or primary evaluator</i>) Peggy Smith	RATER'S TITLE HSA Assistant Director	RATER'S SIGNATURE	DATE RATED
EMPLOYEE'S COMMENTS – <i>Pending – from employee</i>			
This performance evaluation was discussed with me on the date noted above. I understand that my signature attests only that a personal interview was held with me; it does not necessarily indicate that I agree with the evaluation.		EMPLOYEE'S SIGNATURE	DATE SIGNED
SECONDARY REVIEWER'S SECTION (where bargaining unit, HSA Unit or department policy requires a secondary review of rater's evaluation)			
Reviewer's Comments: <i>Pending Dave Anderson review and signature – HSA practice for next level review of new hires' initial PDP</i>			
REVIEWER'S NAME (Print or Type)	REVIEWER'S TITLE	REVIEWER'S SIGNATURE	DATE REVIEWED

Needs Improvement* – The employee has failed to meet one or more of the significant performance expectations for this factor.

- A copy of the signed evaluation will be provided to the employee upon request.

Revised 4/25/2014