

Attached is the feedback tool that I mentioned during the call.  
 We meet minimally twice a year for the formal review process but supervision is regularly done at a minimum on a bi-weekly basis.

Any questions, let me know.  
 thanks



*An Agency of the Jewish Federation of Southern New Jersey*

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## JFCS's Planning, Feedback and Evaluation (PFE) Tool

*Employee:* \_\_\_\_\_ *Position/Title:* \_\_\_\_\_  
*Supervisor:* \_\_\_\_\_ *Date:* \_\_\_\_\_

### GOAL SETTING

**Define Approximately 5 Results-Focused Goals (Refer to instructions. Feel free to copy and paste Goals sections should you have more than 5 goals):**

**The gray boxes will be used at the mid-year point and at the end of the year during performance review/evaluation.**

Goal #1:
Weighted Priority %
What actions can be taken to achieve this goal?
What additional skills or knowledge are needed to fulfill the goal?
How will success be measured? ( <b>Measurements should reflect directly back to the list of actions found above in a one by one sequence</b> )
<p><b>MID-YEAR REVIEW:</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should discuss any changes that took place mid-year that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)</p> <p style="text-align: center;"> <input type="checkbox"/> 1.) On Target    <input type="checkbox"/> 1.) Not On Target         </p>
<p><b>END OF YEAR EVALUATION:</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should each discuss any changes that took place that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you</p>

write!)

1.) Did not meet expectations    2.) Met most expectations    3.) Met all expectations    4.) Exceeded expectations in some areas    5.) Exceeded expectations in all areas

**Employee comments:**

**Supervisor comments:**

Goal #2:

Weighted Priority %

What actions can be taken to achieve this goal?

What additional skills or knowledge are needed to fulfill the goal?

How will success be measured? (**Measurements should reflect directly back to the list of actions found above in a one by one sequence**)

**MID-YEAR REVIEW:** Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should discuss any changes that took place mid-year that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)

1.) On Target    1.) Not On Target

**END OF YEAR EVALUATION:** Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should each discuss any changes that took place that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)

1.) Did not meet expectations    2.) Met most expectations    3.) Met all expectations    4.) Exceeded expectations in some areas    5.) Exceeded expectations in all areas

**Employee comments:**

**Supervisor comments:**

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Goal #3:
Weighted Priority %
What actions can be taken to achieve this goal?
What additional skills or knowledge are needed to fulfill the goal?
How will success be measured? ( <b>Measurements should reflect directly back to the list of actions found above in a one by one sequence</b> )
<b>MID-YEAR REVIEW:</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should discuss any changes that took place mid-year that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)  <p style="text-align: center;"><input type="checkbox"/> 1.) On Target    <input type="checkbox"/> 1.) Not On Target</p>
<b>END OF YEAR EVALUATION:</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should each discuss any changes that took place that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)  <p><input type="checkbox"/> 1.) Did not meet expectations    <input type="checkbox"/> 2.) Met most expectations    <input type="checkbox"/> 3.) Met all expectations    <input type="checkbox"/> 4.) Exceeded expectations in some areas    <input type="checkbox"/> 5.) Exceeded expectations in all areas</p>
<b>Employee comments:</b>
<b>Supervisor comments:</b>

Goal #4:
Weighted Priority %
What actions can be taken to achieve this goal?

What additional skills or knowledge are needed to fulfill the goal?
How will success be measured? ( <b>Measurements should reflect directly back to the list of actions found above in a one by one sequence</b> )
<p><b>MID-YEAR REVIEW:</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should discuss any changes that took place mid-year that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)</p> <p style="text-align: center;"><input type="checkbox"/> 1.) On Target    <input type="checkbox"/> 1.) Not On Target</p> <hr/> <p><b>END OF YEAR EVALUATION</b> Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should each discuss any changes that took place that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)</p> <p><input type="checkbox"/> 1.) Did not meet expectations    <input type="checkbox"/> 2.) Met most expectations    <input type="checkbox"/> 3.) Met all expectations    <input type="checkbox"/> 4.) Exceeded expectations in some areas    <input type="checkbox"/> 5.) Exceeded expectations in all areas</p> <p><b>Employee comments:</b></p> <p><b>Supervisor comments:</b></p>

Goal #5:
Weighted Priority %
What actions can be taken to achieve this goal?
What additional skills or knowledge are needed to fulfill the goal?
How will success be measured? ( <b>Measurements should reflect directly back to the list of actions found above in a one by one sequence</b> )

**MID-YEAR REVIEW:** Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should discuss any changes that took place mid-year that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)

1.) On Target    1.) Not On Target

**END OF YEAR EVALUATION:** Was the goal achieved (Did anything get in the way due to changes or unexpected issues? Supervisor and employee should each discuss any changes that took place that caused a refocusing, including removing items or adding new items planned or otherwise. The box will expand as you write!)

1.) Did not meet expectations    2.) Met most expectations    3.) Met all expectations    4.) Exceeded expectations in some areas    5.) Exceeded expectations in all areas

**Employee comments:**

**Supervisor comments:**

## **CORE VALUES ASSESSMENT**

(Please rate the employee on the following core values at the end of the year)

### **Respect**

(Dignity, Confidentiality, Mindful of Labels, Fairness, Seeing the Whole Person, Understanding the Roles of Others)

1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

### **Empowerment**

(Taking Initiative, Making Decisions to Solve Problems and Improve Service or Performance - For Clients, Colleagues and Self)

1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

### **Honesty/Transparency**

(Exhibiting Truthfulness and Openness with Clients and Colleagues)

1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

### **Compassion/Empathy**

(Understanding Situations and Feelings of Clients and Colleagues)

1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Passion/ Commitment**

(Strong Work Ethic, Dedication to Clients and JFCS)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Intention**

(Plans and Sets Goals with Positive Objectives and Ideals in Mind, Well-Meaning)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Resourcefulness**

(Resiliency, Flexibility, Networking, Creative Thinking)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Collaborative Vision/Teamwork**

(Sharing the Vision, Ability to Work Well with Others Despite Differences)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Expertise**

(Exhibiting and Applying Expert Skills, Knowledge and Competencies for the Benefit of Clients, Colleagues and JFCS)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Accountability**

(Exhibiting Obligation and Willingness to Accept Responsibility for Self and Team)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Positive and Effective Communication**

(Active and Reflective Listening, Ability to Convey Information and Ideas to Achieve Intended Purpose, Sharing Difficult Messages without Creating Conflict)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

## **Life and Work Balance**

(Mindfulness, Equanimity, Ability to Properly Prioritize Work and Life to Create a Meaningful Balance that Allows for Achievement and Enjoyment within Both Work and Personal Life)

- 1.) Did not meet expectations    2.) Met expectations    3.) Exceeded expectations

Score: \_\_\_\_\_

### **END OF YEAR REVIEW: Strengths and Areas for Development**

Supervisor

Describe the individual's strengths and areas for development; areas that need improvement and other observations that impact overall performance. Comments should be based on direct observation of the employee's work as well as anecdotally.

[Empty box for overall rating]

OVERALL RATING \_\_\_\_\_

- Exceeded Expectations in All Areas-5
- Exceeded Expectations in Some Areas-4
- Met Expectations-3
- Met Most Expectations-2
- Did Not Meet Expectations-1

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Employee Comments

Please comment on the accuracy of this appraisal as well as your general working experience and career aspirations.

[Empty box for employee comments]

Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Reviewer's Supervisor's Comments

Comment on the accuracy of the review and upon the employee's performance and potential.

[Empty box for reviewer's supervisor's comments]

Signature \_\_\_\_\_ Date \_\_\_\_\_