Performance Appraisals: Evaluation & Goal-Setting
Review Year Timeline

Charting the Roadmap to Excellence
Agenda

• Set the Stage
• Goal Setting and Goal Alignment
• Goal Setting Components
• S.M.A.R.T. Goals
• Tips for Interactive Goal Setting
• Supporting Goal Achievement
• Regular Follow-up
Agenda (cont’d)

• Revitalize UD’s Performance Appraisal Process
  – New Electronic Performance Appraisal Form
    – Employee Portion
    – Supervisor Portion
    – Employee Sign-off
    – HR Review
• Question and Answer
Set the stage

- **Preparation** – provide advance notice and plan ahead what to say and how to say it. Don't attempt to conduct this session "off the cuff".

- **Privacy and Confidentiality** - Conduct the meeting in a non-public area where both parties will feel more comfortable and willing to be objective and open.

- **Freedom from Interruption** - Hold all telephone calls and inform people in your area that you do not want to be disturbed. You must convey the message that this is an important event.
Set the Stage, (cont’d)

- **Ample Time** - Avoid rushing the employee in and out. Allocate an appropriate period of time for each meeting.
- **Two-Way Communication** - Both parties should talk *and* listen.
- **When the review process is completed, the employee should:**
  - Clearly understand where he/she stands in terms of meeting performance standards and goals for the next review cycle
  - Know where and how to improve
  - Be committed to and motivated to maintaining and/or improving the performance level for the future
Action Verbs

Tips on writing a position description

Action Verbs list

ACCEPTS: To receive; to regard as true, proper, normal, inevitable.

ACCOMPLISHES: To execute fully; to attain.

ACCOUNTS: To give an account of; to make known.

ACCUMULATES: To collect; to gather.

ACHIEVES: To bring to a successful conclusion.

ACKNOWLEDGES: To report the receipt of.

ACQUIRES: To come into possession of.

ACTS: To perform a specified function to carry out a purpose; to exert one’s powers in such a way as to bring about an effect.

ACTIVATES: To mobilize, to set into motion.
Job Duties

Identify, categorize, weigh and collate data of insects collected this past summer (60%)
Job Duties

• Conduct experiments on the chemical ecology of insects.
• Ensure that a safe and proper working environment is being maintained in the laboratory and field.
• Collaborate with undergraduate student employees conducting experiments in the laboratory and field.
• Ensure that data are being collected, maintained and reported in an accurate and proper manner.
• Assist with analyzing and interpretation of data.
• Prepare written progress reports.
In the Workplace, Goal-setting is a Valuable Tool That…

• Communicates work expectations
• Enhances productivity
• Encourages on-going communication and collaboration between employees and supervisors
• Stimulates long-term vision/planning and short-term motivation
• Adds credibility and objectivity to performance evaluations
• Helps to align employee and unit goals with strategic employer objectives
Goal Alignment at the University

UD Strategic Plan

College/Division Goals

Unit/Department Goals

Employee Goals
Goal-setting Components

- **Goal**: statement of results to be achieved within a specific timeframe
- **Standard**: ongoing performance criteria to be repeatedly met or exceeded
- **Competency**: employee attribute(s), ability or skill an individual demonstrates at work
- **Stretch Goal**: extremely ambitious goal that prompts “outside-the-box” thinking
Create S.M.A.R.T.* Goals

• **Specific** – precise and detailed
• **Measurable** – with criteria for determining progress and success
• **Achievable** – attainable and action-oriented
• **Realistic** – relevant and aligned
• **Time-related** – grounded within a time-frame

*Peter Drucker, The Practice of Management
Examples of S.M.A.R.T. Goals

• **Poor Examples:**
  – Reduce customer complaints daily.
  – Produce budget reports timely.
  – Provide job quotes to customers.
  – Produce documents and distribute to departments weekly.
  – Ensure all projects are completed in a timely manner.
Examples of S.M.A.R.T. Goals

• **Good Examples:**
  – Resolve customer conflicts within 24 hours of the initial interaction to the customer’s satisfaction.
  – Reconcile the department financial reports by the fifteenth of every month with no increase in reconciliation errors.
  – Provide job quotes that are no more that 10% off final price.
  – Produce outgoing documents with zero defects/errors in the final draft.
  – Ensure that 90% of projects are completed on time and require no rework.
Tips for Interactive Goal Setting

• Clearly state the performance goal or standard
• Break it down into manageable components
• Isolate resources needed to accomplish each component
• Identify possible barriers
• Develop a timeline (e.g., quarterly) to meet and review progress
“Need to knows” for supporting goal achievement

• What skills are needed?
• What information/knowledge is needed?
• What help/collaboration is needed?
• What resources are needed?
• What might block progress?
Regular Follow-Up is Critical!

• Supervisors should regularly review goal progress with their employees
• Dialogue keeps goals fresh and on track
• Milestones can help to sustain motivation
• Changing needs, priorities and resources may require goal adjustment, postponement or addition of a new goal
How can Supervisors Revitalize UD’s Performance Appraisal Process?

• Ensure 100 percent participation
• Engage in interactive goal-setting
• Establish meetings with employees to discuss progress toward goals (quarterly is recommended)
• Strengthen the correlation between employee performance and distribution of merit raises
• Identify and reward exceptional performance
The UD’s New Web Based Performance Appraisal Process
Performance Planning and Appraisal Form (printable view)

The annual appraisal covers the time period from April 1 of the previous year through March 31 of the current year.

This appraisal provides a written record of the employee’s major job duties, goals and competencies, as well as the supervisor’s assessment of performance. It is designed to improve job understanding, encourage effective performance and establish goals that support unit and career development. In addition, the appraisal provides information to support merit salary determinations and other personnel actions. Supervisors are expected to be accurate and candid in their evaluation of employees. This appraisal will become part of the employee’s permanent personnel file.
Employee Portion

Employee Information

Employee: Employee, Aimee A (7001234567)
Job title: Program Coordinator
Department/Office: Conference Center
Supervisor: List all immediate supervisors.
(Applookup)
Appraisal period: 04/01/2009 - 03/31/2010
Date due to HR: 04/29/2010

Major Responsibilities

List the major responsibilities of your position in approximate order of importance. Use the "Add" button to create each entry.

Self-appraisal

The self-appraisal section is designed to encourage constructive discussion between you and your supervisor about your accomplishments and professional goals. The more involved you are in your performance appraisal, the more effective the appraisal interview is likely to be. Type or cut and paste up to 16,000 characters, about 4 pages of text.

Position description: Do you feel that the expectations of your job are clear and consistent with your position description?
## Self-appraisal

The self-appraisal section is designed to encourage constructive discussion between you and your supervisor about your accomplishments and professional goals. The more involved you are in your performance appraisal, the more effective the appraisal interview is likely to be. Type or cut and paste up to 18,000 characters, about 4 pages of text.

<table>
<thead>
<tr>
<th>Position description:</th>
<th>Do you feel that the expectations of your job are clear and consistent with your position description?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18,000 characters left</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accomplishments:</th>
<th>Identify at least two accomplishments during the past year that enhanced your job performance and the goals of the office/unit.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18,000 characters left</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Development:</th>
<th>Indicate your immediate and longer-term career objectives, including any plans for further education and/or skill enhancement.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>18,000 characters left</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Training opportunities:</th>
<th>What courses or training programs would enable you to improve your performance and contribute to overall unit goals?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Training opportunities: What courses or training programs would enable you to improve your performance and contribute to overall unit goals?

[Text box]

18,000 characters left

Organizational climate: Are there changes in the way the office/unit functions that would assist you and others to perform more effectively?

[Text box]

18,000 characters left

Prior-year Goals/Objectives

List the prior-year goals that were agreed upon by employee and supervisor. View previous evaluation.

[Text box]

[Add button]

Goal Setting Worksheet (To be discussed and agreed upon by employee and supervisor.)

List goals for the coming year that will support unit objectives and enhance job performance. You may type or cut and paste up to 18,000 characters, about 4 pages of text. The "Add" button can be used to create individual entries. We recommend using the S.M.A.R.T. criteria for setting effective goals:

Done
Goal Setting Worksheet (To be discussed and agreed upon by employee and supervisor.)

List goals for the coming year that will support unit objectives and enhance job performance. You may type or cut and paste up to 10,000 characters, about 4 pages of text. The "Add" button can be used to create individual entries. We recommend using the S.M.A.R.T. criteria for setting effective goals:

- **Specific** - Helps staff member to understand exactly what is expected.
- **Measurable** - Measurements help staff member and supervisor understand when the expectation has been achieved.
- **Achievable** - Expectations should focus on end results.
- **Results-Oriented** - Expectations should be realistic.
- **Time-Specific** - Deadlines should be identified where applicable.

Well-worded example: I want to write a work manual on how to on-board graduate students that covers all aspects of on-boarding and get it completed by June 30th 2010. I will write at least 4 pages every weekday until I complete the manual.

Poorly-worded example: I want to write a manual.
Performance Planning and Appraisal Form (printable view)

The annual appraisal covers the time period from April 1 of the previous year through March 31 of the current year.

This appraisal provides a written record of the employee’s major job duties, goals and competencies, as well as the supervisor’s assessment of performance. It is designed to improve job understanding, encourage effective performance and establish goals that support unit and career development. In addition, the appraisal provides information to support merit salary determinations and other personnel actions. Supervisors are expected to be accurate and candid in their evaluation of employees. This appraisal will become part of the employee’s permanent personnel file.
Employee Information

Employee: Aimee A (7001234567)
Job title: Program Coordinator
Department/Office: Conference Center
Supervisor: Jeremy D (12345)
Supervisor2: Cythia (700234565)
Appraisal period: 04/01/2008 - 04/30/2009
Date due to HR: 04/28/2009
Date of in-person appraisal: [use format mm/dd/yyyy]

Major responsibilities
List the major responsibilities of your position in approximate order of importance.

- To provide ongoing support as needed for currently registered programs.
  Participate in department and project team meetings.
  Follow University policy and procedures.
- Participate in internal and external training opportunities.
  Prioritize work responsibilities and meet deadlines.

Supervisor’s comments on responsibilities

Comments:
### Self-appraisal

The self-appraisal section is designed to encourage constructive discussion between you and your supervisor about your accomplishments and professional goals. The more involved you are in your performance appraisal, the more effective the appraisal interview is likely to be.

<table>
<thead>
<tr>
<th>Position description</th>
<th>Do you feel that the expectations of your job are clear and consistent with your position description? Yes, I feel that the expectations and job responsibilities are clear.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accomplishments</td>
<td>Identify at least two accomplishments during the past year that enhanced your job performance and the goals of the office/unit. Support for programs is an ongoing responsibility as more departments continue to use on-campus conference services as opportunities arise.</td>
</tr>
<tr>
<td>Development</td>
<td>Indicate your immediate and longer-term career objectives, including any plans for further education and/or skill enhancement. My immediate plans are to continue towards my degree in Hotel and Restaurant Management.</td>
</tr>
<tr>
<td>Training opportunities</td>
<td>What courses or training programs would enable you to improve your performance and contribute to overall unit goals? I have taken advantage of additional seminars in conference management.</td>
</tr>
<tr>
<td>Organizational climate</td>
<td>Are there changes in the way the office/unit functions that would assist you and others to perform more effectively? No changes are needed that I am aware of at this time.</td>
</tr>
</tbody>
</table>

### Prior year goals/objectives

List the prior-year goals that were agreed upon by employee and supervisor.

- To take more responsibility for scheduling.
- Participate in department and project team meetings.
Training opportunities: What courses or training programs would enable you to improve your performance and contribute to overall unit goals?
I have taken advantage of additional seminars in conference management.

Organizational climate: Are there changes in the way the office/unit functions that would assist you and others to perform more effectively?
No changes are needed that I am aware of at this time.

Prior-year goals/objectives
List the prior-year goals that were agreed upon by employee and supervisor.

- [ ] To take more responsibility for scheduling.
- [ ] Participate in department and project team meetings.
- [ ] Jan-Mar Goal: Respond to issues within 24 hours, as they arise.
- [ ] Participate in internal and external training opportunities.

Supervisor’s Narrative
Review the employee’s list of major responsibilities, and note your concurrence or comment on any additions, deletions or changes in priority that you feel are appropriate. Using the space below, please provide a detailed assessment of the employee’s performance. Be clear and concise in your articulation of strengths, achievements, goal attainment, and areas for growth and development.
Supervisor's Narrative

Review the employee's list of major responsibilities, and note your concurrence or comment on any additions, deletions or changes in priority that you feel are appropriate. Using the space below, please provide a detailed assessment of the employee's performance. Be clear and concise in your articulation of strengths, achievements, goal attainment, and areas for growth and development.

Performance Rating

Specify rating from 1-5 or NA with 1 as unsatisfactory and 5 as outstanding (tenths permitted - e.g., 3.2)

Scale:
5 - Outstanding: Work performance is consistently superior to job expectations.
4 - Exceeds expectations: Work performance is consistently above expectations.
3 - Meets expectations: Work performance is consistently meets job expectations.
2 - Partially meets expectations: Work performance meets some, but not all, job expectations.
1 - Unsatisfactory: Work performance is inadequate and inferior to job expectations. Performance at this level cannot be allowed to continue.
N/A - Not applicable: Not relevant to the job.

Performance Categories

Quality of work: Demonstrates accuracy, thoroughness and effectiveness

Add optional comments

Your rating

Done
Quality of work: Demonstrates accuracy, thoroughness and effectiveness
Add optional comments

Flexibility: Performs well under pressure; adaptable; welcomes change as an opportunity
Add optional comments

Initiative: Sets own constructive work practices; recommends new procedures; seeks creative solutions to obstacles or problems
Add optional comments

Dependability: Completes work in a timely manner and meets deadlines; follows through on plans and assignments
Add optional comments

Interpersonal relations: Is cooperative, considerate and tactful in dealing with supervisors, subordinates, peers, faculty, students and others
Add optional comments

Organization: Work is well conceived, analyzed and carried out systematically
Add optional comments

Communication abilities: Express thoughts clearly and concisely, both orally and in writing
Add optional comments

Embraces diversity: Fosters an inclusive workplace where diversity and individual differences are valued
Add optional comments

Facing issues: Handles issues and seeks to resolve them by constructive action at his or her own level
Add optional comments

Done
<table>
<thead>
<tr>
<th>Skill</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Communication abilities:</strong> Express thoughts clearly and concisely, both orally and in writing</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>Embraces diversity:</strong> Fosters an inclusive workplace where diversity and individual differences are valued</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>Facing issues:</strong> Handles issue and seeks to resolve them by constructive action at his or her own level</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>Utilization of resources:</strong> Utilizes funds, staff and/or equipment economically and effectively</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>Judgment:</strong> Exercises sound judgment; demonstrates awareness of work-related considerations in decision-making</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>Growth and development:</strong> Attempts to improve competencies in job-related areas; seeks opportunities to develop professionally</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>For Supervisors - Leadership:</strong> Creates a vision or goal for one's work unit and communicates it in a way that motivates others to implement it; understands and leverages the organization's structure and relationships; pursues organizational support and resources; develops strategies to include divergent opinions and to overcome adversity; moves plans forward to a specific course of action</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>For Supervisors - Managing conflict:</strong> Ensures productive resolution of conflict; recognizes different viewpoints; brings conflict into the open and encourages those involved to find appropriate solutions</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
<tr>
<td><strong>For Supervisors - Managing performance:</strong> Sets clear goals and expectations for staff, follows progress against goals; provides regular feedback; addresses performance issues promptly; fosters learning and development; provides public recognition of staff accomplishments</td>
<td></td>
</tr>
<tr>
<td>Add optional comments</td>
<td></td>
</tr>
</tbody>
</table>
List goals for the coming year that will support unit objectives and enhance job performance. We recommend using the S.M.A.R.T. criteria for setting effective goals:

- **Specific** - Helps staff member to understand exactly what is expected.
- **Measurable** - Measurements help staff member and supervisor understand when the expectation has been achieved.
- **Achievable** - Expectations should focus on end results.
- **Results-Oriented** - Expectations should be realistic.
- **Time-Specific** - Deadlines should be identified where applicable.

---

**Well worded example:** I want to write a work manual on how to on-board graduate students that covers all aspects of on-boarding and get it completed by June 30th 2010. I will write at least 4 pages every weekday until I complete the manual.

**Poorly worded example:** I want to write a manual.
Overall rating

The overall rating is a combination of the narrative and performance-factor ratings.

Overall rating: * The overall rating is a combination of the narrative and performance-factor ratings.

Routing

Originator: Employee, Aimee A
Current holder: Supervisor, Jeremy D

Date: 2010-04-10 11:18

Action:
- return to Aimee Employee for editing
- send to Cynthia Supervisor
- send to [lookup]
- share with Aimee Employee for review/discussion

Comments to employee:
Comments to the employee will display on all views.

Comments to supervisor(s):
Comments to the supervisor(s) are not viewable by the employee.
Employee Signoff

Performance Planning and Appraisal Form (printable view)

The annual appraisal covers the time period from April 1 of the previous year through March 31 of the current year. This appraisal provides a written record of the employee’s major job duties, goals and competencies, as well as the supervisor’s assessment of performance. It is designed to improve job understanding, encourage effective performance and establish goals that support unit and career development. In addition, the appraisal provides information to support merit salary determinations and other personnel actions. Supervisors are expected to be accurate and candid in their evaluation of employees. This appraisal will become part of the employee’s permanent personnel file.
Symbol Key: * Required Information, ! Error

Employee Information

Employee: Employee, Aimee A (7001234567)
Job title: Program Coordinator
Department/Office: Conference Center
Supervisor: Supervisor, Jeremy D (12345)
Supervisor2, Cynthia (70023456)
Appraisal period: 04/01/2008 - 3/31/2009
Date due to HR: 04/28/2009
Date of in-person appraisal: 04/20/2009

Major Responsibilities
List the major responsibilities of your position in approximate order of importance.

- To provide ongoing support as needed for currently registered programs.
- Participate in department and project team meetings.
- Follow University policy and procedures.
- Participate in internal and external training opportunities.
- Prioritize work responsibilities and meet deadlines.

Supervisor's comments on responsibilities

Supervisor: Jeremy D. Supervisor
Comments: I concur with Aimee's assessment of her responsibilities, however, I might adjust the order of importance as follows:

1. Delegate more to coworkers and subordinates.
2. Take more responsibility for scheduling.

Date: 03/28/2009
### Supervisor’s comments on responsibilities

**Supervisor:** J. D. Supervisor  
**Comments:** I concur with Aimee’s assessment of her responsibilities, however, I might adjust the order of importance as follows:

1. Delegate more to coworkers and subordinates.  
2. Take more responsibility for scheduling.  
3. Participate in department and team meetings.  
4. Participate in internal and external training opportunities, as well as provide training to subordinates.

Aimee has a pleasant, easy-going personality. She works well on teams and is respected by her peers; as well as her direct reports. We look forward to another successful year, as Aimee steps more into the daily management and direction of conference operations.

**Supervisor:** Cynthia Supervisor  
**Comments:** This would be the supervisor’s comments on the responsibilities of the employee from supervisor #2.

---

### Self-appraisal

The self-appraisal section is designed to encourage constructive discussion between you and your supervisor about your accomplishments and professional goals. The more involved you are, the more effective the performance appraisal interview is likely to be.

<table>
<thead>
<tr>
<th>Position description</th>
<th>Do you feel that the expectations of your job are clear and consistent with your position description?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes, I feel that the expectations are clear.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accomplishments</th>
<th>Identify at least two accomplishments during the past year that enhanced your job performance and the goals of the office/unit.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Support for programs is an ongoing responsibility as more departments continue to use on-campus conference services as opportunities arise.</td>
</tr>
</tbody>
</table>
Prior year Goals/Objectives
List the prior-year goals that were agreed upon by employee and supervisor.

- To take more responsibility for scheduling.
- Participate in department and project team meetings.
- Jan-Mar Goal: Respond to issues within 24 hours, as they arise.
- Participate in internal and external training opportunities.

Supervisor's Narrative
Review the employee's list of major responsibilities, and note your concurrence or comment on any additions, deletions or changes in priority that you feel are appropriate. Using the space below, please provide a detailed assessment of the employee's performance. Be clear and concise in your articulation of strengths, achievements, goal attainment, and areas for growth and development.

Supervisor: Jeremy D. Supervisor
Comments: I concur with Aimee's assessment of prior-year goals.

Supervisor: Cynthia Supervisor2
Comments: This would be the supervisor's comments on the prior-year goals of the employee from supervisor #2.

Date: 03/28/2009

Performance Rating

Scale:
5 - Outstanding: Work performance is consistently superior to job expectations.
4 - Exceeds expectations: Work performance is consistently above expectations.
3 - Meets expectations: Work performance is consistently meets job expectations.
2 - Partially meets expectations: Work performance meets some, but not all, job expectations.
1 - Unsatisfactory: Work performance is inadequate and inferior to job expectations. Performance at this level cannot be allowed to continue
N/A - Not applicable: Not relevant to the job.
<table>
<thead>
<tr>
<th>Category</th>
<th>Evaluation</th>
<th>Supervisor</th>
<th>Comments</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of work</td>
<td>Demonstrates accuracy, thoroughness and effectiveness</td>
<td>Jeremy</td>
<td>These are comments from supervisor #1.</td>
<td>03/28/2010</td>
</tr>
<tr>
<td>Flexibility</td>
<td>Performs well under pressure, adaptable, welcomes change as an opportunity</td>
<td>Cynthia</td>
<td>These are comments from supervisor #2.</td>
<td>04/01/2010</td>
</tr>
<tr>
<td>Initiative</td>
<td>Sets own constructive work practices; recommends new procedures; seeks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>creative solutions to obstacles or problems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependability</td>
<td>Completes work in a timely manner and meets deadlines, follows through on</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>plans and assignments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interpersonal relations</td>
<td>Is cooperative, considerate and tactful in dealing with supervisors,</td>
<td>Cynthia</td>
<td>These are comments from supervisor #2.</td>
<td>04/01/2010</td>
</tr>
<tr>
<td></td>
<td>subordinates, peers, faculty, students and others</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Work is well conceived, analyzed and carried out systematically</td>
<td></td>
<td></td>
<td>3.2</td>
</tr>
<tr>
<td>Communication abilities</td>
<td>Express thoughts clearly and concisely, both orally and in writing</td>
<td></td>
<td></td>
<td>3.8</td>
</tr>
<tr>
<td>Embraces diversity</td>
<td>Fosters an inclusive workplace where diversity and individual differences</td>
<td>Jeremy</td>
<td>These are comments from supervisor #1.</td>
<td>03/28/2010</td>
</tr>
<tr>
<td></td>
<td>are valued</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facing issues</td>
<td>Handles issues and seeks to resolve them by constructive action at his or</td>
<td></td>
<td></td>
<td>2.6</td>
</tr>
<tr>
<td></td>
<td>her own level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilization of resources</td>
<td>Utilizes funds, staff and/or equipment economically and effectively</td>
<td></td>
<td></td>
<td>3.6</td>
</tr>
<tr>
<td>Judgment</td>
<td>Exercises sound judgment, demonstrates awareness of work-related</td>
<td></td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>considerations in decision-making</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Growth and development</td>
<td>Attempts to improve competencies in job-related areas, seeks opportunities</td>
<td></td>
<td></td>
<td>3.4</td>
</tr>
<tr>
<td></td>
<td>to develop professionally</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Goal Setting Worksheet (To be discussed and agreed upon by employee and supervisor.)

Goal Setting: List goals for the coming year that will support unit objectives and enhance job performance. We recommend using the S.M.A.R.T. criteria for setting effective goals:

- **Specific** - Helps staff member to understand exactly what is expected.
- **Measurable** - Measurements help staff member and supervisor understand when the expectation has been achieved.
- **Achievable** - Expectations should focus on end results.
- **Results-Oriented** - Expectations should be realistic.
- **Time-Specific** - Deadlines should be identified where applicable.

**Well worded example:** I want to write a work manual on how to on-board graduate students that covers all aspects of on-boarding and get it completed by June 30th, 2010. I will write at least 4 pages every weekday until I complete the manual.

**Poorly worded example:** I want to write a manual.

To take more responsibility for scheduling.
Participate in department and project team meetings.
Jan-Mar Goal. Respond to issues within 24 hours, as they arise.
Participate in internal and external training opportunities.

**Overall rating**

The overall rating is a combination of the narrative and performance-factor ratings.

**Overall rating:** 3.8

**Employee comments**

This section may be used to comment on the appraisal and any other observations recorded on this form.
Employee comments

This section may be used to comment on the appraisal and any other observations recorded on this form.

Employee name: [Field]

Comments: [Field] 75,000 characters left

Routing

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator</td>
<td>Employee, Aimee A</td>
<td>2010-04-10 11:18</td>
</tr>
<tr>
<td>Supervisor 1</td>
<td>Supervisor, Jeremy D</td>
<td>2010-04-10 15:36</td>
</tr>
<tr>
<td>Supervisor 2</td>
<td>Supervisor2, Cynthia</td>
<td>2010-04-11 01:23</td>
</tr>
<tr>
<td>Current holder</td>
<td>Supervisor, Jeremy D</td>
<td></td>
</tr>
</tbody>
</table>
HR Review

- Appraisals will be sent to HR for review.
- After HR review the forms will be completed and update HR with overall rating.
- Prior forms will be available year round.
- A printable view will be available.

**DEADLINE TO SUBMIT PERFORMANCE APPRAISAL FORMS TO HR IS: 3/31/2010**