Performance Appraisals: Evaluation & Goal-Setting
Review Year Timeline
4/1/2012 – 3/31/2013

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

• Electronic Performance Appraisal System
  – 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. Do not attempt to conduct this session during a “coffee break”.

• **Privacy and Confidentiality** – Conduct the meeting 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, 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 dialogue** – 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.
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-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 attributes(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

• **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 – cont’d

- **(S)** Resolve customer conflicts within 24 hours of the initial interaction to the customer’s satisfaction.
- **(M)** Reconcile the department financial reports by the fifteenth of every month with no increase in reconciliation errors.
- **(A)** Provide job quotes that are no more than 10% off final price.
- **(R)** Produce outgoing documents with zero defects/errors in the final draft.
- **(T)** 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 expectations
• Break it down into manageable components
• Isolate resources needed to accomplish each component
• Identify possible barriers
• Develop a periodic time 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 & employees should regularly review goal progress
- Dialogue keeps goals fresh and on track
- Milestones can help to sustain motivation & excitement
- Changing needs, priorities and resources may require goal adjustment, postponement or addition of a new goal
How can “WE” Revitalize UD’s Performance Appraisal Process?

• Ensure 100 percent participation
• Engage in interactive S.M.A.R.T. goal-setting
• Establish meetings to discuss progress toward goals (quarterly is recommended)
• Strengthen the correlation between employee performance and distribution of merit raises
• Identify and reward exceptional performance all year long
UD’s Electronic Performance Appraisal Form
Menu Page
Performance Appraisal System

For questions on this application, contact Human Resources at (302) 831-8677 between 8:00 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-appraisals@udel.edu.

My appraisals  Appraisals requiring my attention  View as Supervisor  My Departments  Reports

Appraisals requiring my attention

Search by:  Review year  Unit  Employee name or ID

2010 to 2011  IT-Management Information Serv  (enter all or part of the last name, ID, or use lookup)
### Performance Appraisal System

For questions on this application, contact Human Resources at (302) 831-8577 between 8:00 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-appraisals@udel.edu.

#### Supervisors

**Search by:** Review year, Unit, Employee name or ID

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<thead>
<tr>
<th>Employee</th>
<th>UD ID</th>
<th>Merit Group</th>
<th>Supervisor</th>
<th>Department</th>
<th>Review Year</th>
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<td>Raker, Bruce A</td>
<td>IT - Management Information Serv</td>
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### Download to spreadsheet

- **Employee**: Raker, Bruce A
  - **UD ID**: 10180
  - **Merit Group**: 00760
  - **Supervisor**: Raker, Lisa M
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started

- **Employee**: Fols, Stephen M
  - **UD ID**: 10189
  - **Merit Group**: 00050
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started

- **Employee**: Green, James C
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  - **Merit Group**: 00050
  - **Supervisor**: Raker, Lisa M
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Completed

- **Employee**: Fenimore, John E
  - **UD ID**: 22658
  - **Merit Group**: 00050
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started

- **Employee**: Adkins, David H
  - **UD ID**: 27373
  - **Merit Group**: 00050
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started

- **Employee**: Surampudi, Raja Rao Jagga
  - **UD ID**: 30578
  - **Merit Group**: 00050
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started

- **Employee**: Kelso, John F
  - **UD ID**: 31742
  - **Merit Group**: 00050
  - **Department**: IT-Management Information Serv
  - **Review Year**: 2011 to 2012
  - **Current Holder**: Not Started
Performance Appraisal System
For questions on this application, contact Human Resources at (302) 831-8677 between 8:00 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-appraisals@udel.edu.

Reports

Appraisal Period: Use Ctrl-Click (PC) or Command-Click (Mac) to choose more than one.
- 2009 to 2010
- 2010 to 2011
- 2011 to 2012

Department: IT-Management Information Serv

Employee ID or Name: [field]
Supervisor ID or Name: [field]

Salary Plan: Use Ctrl-Click (PC) or Command-Click (Mac) to choose more than one.
- 202
- 230

Merit Group:
- 00050 (IT - MANAGEMENT INFORMATION SV)
- 00780 (VP INFORMATION TECHNOLOGIES)

Status:
- Originator
- Supervisor
- Review by Other
- Originator Sign
- Supervisor Sign

Search!
Performance Appraisal System

For questions on this application, contact Human Resources at (302) 831-8677 between 8:00 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-appraisals@udel.edu.

Reports

**Show Search Options**

**Overall Ratings (sorted)**

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**Calculated Ratings (sorted)**

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**Median:** 5  
**Average:** 4.0600  
**Total Number of Records:** 5

**Download to spreadsheet**

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Access Request Form

Access Request: Performance Appraisal System
Use this form to request access to the electronic Performance Planning and Appraisal process. For questions, contact Human Resources at (302) 831-9677 between 8:30 a.m. and 5:00 p.m., Monday through Friday, or through email at hr-access@udel.edu.

Symbol Key: * Required Information:  □ Error

Requestor's Information

| Requested by: | Bloch Sarah M (10137) |
| Email: | ABLOCH@UDEL.EDU |
| Department: | Records Management (0635) |

Access Requested For

| Add / update access for:* | Enter the UUID of the employee for whom you are requesting access (lookup) |
| Access type:* | Choose one |
| Tree node(s) requested:* | Department Tree Node (lookup) |
| Run reports:* | This adds the "Reports" tab to your view. |
| View departmental access:* | This adds the "Access" tab to the user's view and allows them to view who has departmental access. |
| May generate email reminders:* | Choose one |
| Justification:* | All access is granted on a need to know basis. Access will not be granted without justification and supervisor's approval. |

Save & exit | Next step
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
Self-appraisal

This 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). Use the icon to paste text copied from Microsoft Word.

Position description: Do you think that the expectations of your job are clear and consistent with your position description?

Accomplishments: Identify at least two accomplishments during the past year that enhanced your job performance and the goals of the office/unit.

Development: Indicate your immediate and long-term career objectives, including any plans for further education and/or skill enhancement.

Training opportunities: What courses or training programs would enable you to improve your performance and contribute to overall unit goals?
Goal Coming Year (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). Use the icon to paste text copied from Microsoft Word. Additional tips for writing goals can be found on our website. We recommend using the S.M.A.R.T. criteria for setting effective goals:

- Specific - Helps employee understand exactly what is expected.
- Measurable - Helps employee and supervisor understand when the expectation has been achieved.
- Achievable - Expectations should be realistic.
- Results-Oriented - Expectations should focus on end results.
- 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 complete it by June 30, 2010. I will write at least 4 pages every weekday until I complete the manual.

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

You can list all your goals and objectives in one text box or use the “Add another goal or objective” button to list each item in a separate text box.
Upon submit, your appraisal will be routed to Jeremy Supervisor, then Cynthia Supervisor2, the supervisor(s) you provided above. If needed, you may change your supervisor above. You will see your appraisal again when your supervisor(s) returns it to you. See more information on routing at http://www.udel.edu/HRSystemsAdmin/performance/

Review the information that you provided and then submit your appraisal.
Performance Planning and Appraisal Notification

Employee:
Employee, Aimee 59079

Form ID:
824

Employee, Aimee has initiated a Performance Planning and Appraisal form which requires your attention.

Action needed:
   2. If changes are required, return to Employee, Aimee for editing.
   3. Complete the Supervisor's Narrative.
   4. Complete the Performance Rating for each of the performance categories with an appropriate value of 1-5 or N/A.
   5. Review the Goal Setting Worksheet.
   6. Complete the Overall Rating.

You may access the form at:
https://mis183.mis.udel.edu/appraisals/appraisal.action?appraisalId=824

If you have any questions, please contact the Office of Human Resources at 831-2171.
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 files.
**Employee Information**

Employee: Employee, Aimee A (7001234567)
Position title: Program Coordinator
Position number: 10002840
Department/Office: Conference Center
Supervisor: Supervisor, Jeremy D (12345)
Supervisor2, Cynthia (70023456)
Appraisal period: 04/01/2008 - 3/31/2009
Date due to HR: 04/29/2009

**Major responsibilities**

List the major responsibilities of your position in approximate order of importance. You may type or cut and paste up to 16,000 characters (about 4 pages of text). The icon pastes text copied from Microsoft Word.

- Plan logistical and administrative arrangements with various conference groups, which may include:
  - meeting with necessary campus departments to arrange for services and equipment
  - coordinating audio-visual equipment, meeting room and dining needs
  - assisting with light meeting preparation work (moving tables, chairs, boxes, etc.)
  - assisting with registration and various administrative duties as directed by the Assistant Program Director

- Make special deliveries as needed on/off campus.

- Respond to the needs and requests of conference participants at all times.

- Enforce applicable policies and regulations.
Major responsibilities

List the major responsibilities of your position in approximate order of importance. You may type or cut and paste up to 18,000 characters (about 4 pages of text). The icon pastes text copied from Microsoft Word.

- Plan logistical and administrative arrangements with various conference groups, which may include:
  - meeting with necessary campus departments to arrange for services and equipment
  - coordinating audio-visual equipment, meeting room and dining needs
  - assisting with light meeting preparation work (moving tables, chairs, boxes, etc.)
  - assisting with registration and various administrative duties as directed by the Assistant Program Director

- Make special deliveries as needed on/off campus.

- Respond to the needs and requests of conference participants at all times.

- Enforce applicable policies and regulations.

- Complete other assignments as directed.

Supervisor’s comments on responsibilities

Comments:
Self-appraisal

This 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). Use the icon to paste text copied from Microsoft Word.

Position description: Do you feel that the expectations of your job are clear and consistent with your position description?
Yes, I believe that my duties are clear and consistent with the position description.

Accomplishments: Identify at least two accomplishments during the past year that enhanced your job performance and the goals of the office/unit.
- I acted as group contact and liaison for all assigned groups for the State Water Resource conference.

Support for programs is an ongoing responsibility as more departments continue to use on-campus conference services as opportunities arise.

Development: 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.

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. Use the icon to paste text copied from Microsoft Word. View previous evaluation.

You can list all your goals and objectives in one text box or use the "Add another goal or objective" button to list each item in a separate text box.

Supervisor's Narrative
**Supervisor’s Narrative**

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:

  Work is done neatly and thoroughly.

  1,000 characters left
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.
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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
NA - Not applicable: Not relevant to the job.

Performance Categories

Quality of work: Demonstrates accuracy, thoroughness and effectiveness
Add optional comments
Work is done neatly and thoroughly.

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

**Utilization of resources**: Utilizes funds, staff and/or equipment economically and effectively.
Add optional comments

**Judgment**: Exercises sound judgment; demonstrates awareness of work-related considerations in decision-making.
Add optional comments

**Growth and development**: Attempts to improve competencies in job-related areas; seeks opportunities to develop professionally.
Add optional comments

**For Supervisors - Leadership**: 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.
Add optional comments

**For Supervisors - Managing conflict**: Ensures productive resolution of conflict; recognizes different viewpoints; brings conflict into the open and encourages those involved to find appropriate solutions.
Add optional comments

**For Supervisors - Managing performance**: 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.
Add optional comments
Second Supervisor Portion
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.

**Position description:** 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.

**Accomplishments:** 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.

**Development:** 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.

**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. Use the "Add" button to create each entry or use the icon to paste from Microsoft Word. View previous evaluation.

You can list all of your goals and objectives in one text box, or use the "Add another goal or objective" button to list each item in a separate box.

Reorder Remove Prior-year Goals/Objectives

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Sample text
Prior year goals/objectives

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You can list all of your goals and objectives in one text box, or use the "Add another goal or objective" button to list each item in a separate box.
Performance Rating

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

Scale:
1. Unsatisfactory: Work performance inadequate and inferior to job expectations. Performance at this level cannot be allowed to continue.
2. Partially meets expectations: Work performance meets some, but not all, job expectations.
5. Outstanding: Work performance consistently superior to job expectations.

N/A - Not applicable: Not relevant to the job.

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<th>Your rating</th>
<th>Performance Categories</th>
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<tbody>
<tr>
<td>3.5</td>
<td>Quality of work: Demonstrates accuracy, thoroughness and effectiveness</td>
</tr>
<tr>
<td></td>
<td>Supervisor: Surampudy Raja Rao Jagga</td>
</tr>
<tr>
<td></td>
<td>Comments: supervisor 1 comment</td>
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<td>Add optional comments</td>
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<td>4.0</td>
<td>Flexibility: Performs well under pressure; adaptable; welcomes change as an opportunity</td>
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<td>Initiative: Sets own constructive work practices; recommends new procedures; seeks creative solutions to obstacles or problems</td>
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<td>Dependability: Completes work in a timely manner and meets deadlines; follows through on plans and assignments</td>
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<td>Add optional comments</td>
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<td>3.0</td>
<td>Organization: Work is well conceived, analyzed and carried out systematically</td>
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<tr>
<td>3.8</td>
<td>Communication abilities: Express thoughts clearly and concisely, both orally and in writing</td>
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</table>
3.0  Embraces diversity: Fosters an inclusive workplace where diversity and individual differences are valued  
Add optional comments

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

3.0  Utilization of resources: Utilizes funds, staff and/or equipment economically and effectively  
Add optional comments

3.0  Judgment: Exercises sound judgment; demonstrates awareness of work-related considerations in decision-making  
Add optional comments

3.0  Growth and development: Attempts to improve competencies in job-related areas; seeks opportunities to develop professionally  
Add optional comments

n/a  For Supervisors - Leadership: 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  
Add optional comments

n/a  For Supervisors - Managing conflict: Ensures productive resolution of conflict; recognizes different viewpoints; brings conflict into the open and encourages those involved to find appropriate solutions  
Add optional comments

n/a  For Supervisors - Managing performance: 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  
Add optional comments

Overall rating

4.3  Overall rating: The overall rating is not required to reflect an average of the individual ratings as some may be weighted more than others. It should reflect the overall performance of the employee and should relate to the individual ratings.  
Add optional comments
Appraiser's action

Action:
- Return to Aimee Employee for editing. Employee won't see ratings or supervisors' narrative.
- Send to next supervisor: Supervisor, Jeremy D.
- Share with Aimee Employee prior to in-person appraisal.
- Optional, send for review. Your department may require additional reviewers

Comments to employee:
- 1000 characters left

Comments to supervisor(s):
- 1000 characters left
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 - 03/31/2009
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.
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.
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.

Date: 03/28/2009

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

Date: 04/01/2009

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.

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

Yes, I feel that the expectations are clear.

Accomplishments: 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.
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.
Date: 03/26/2009

Supervisor: Cynthia Supervisor2
Comments: This would be the supervisor's comments on the prior-year goals of the employee from supervisor #2.
Date: 04/01/2009

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.
Performance Rating (Specify rating from 1-5 or N/A with 1 as unsatisfactory and 5 as outstanding (tenths permitted - e.g., 3.2))

Scale:
- 5 - Outstanding: Work performance consistently superior to job expectations.
- 4 - Exceeds expectations: Work performance consistently above expectations.
- 3 - Meets expectations: Work performance consistently meets job expectations.
- 2 - Partially meets expectations: Work performance meets some, but not all, job expectations.
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Your rating | Performance Categories
---|---
3.5 | Quality of work: Demonstrates accuracy, thoroughness and effectiveness
- Supervisor: Surampudi Raja Rao Jagga
- Comments: supervisor 1 comment

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3.7 | Initiative: Sets own constructive work practices; recommends new procedures; seeks creative solutions to obstacles or problems

4.0 | Dependability: Completes work in a timely manner and meets deadlines; follows through on plans and assignments

3.5 | Interpersonal relations: Is cooperative, considerate and tactful in dealing with supervisors, subordinates, peers, faculty, students and others

3.0 | Organization: Work is well conceived, analyzed and carried out systematically

3.8 | Communication abilities: Express thoughts clearly and concisely, both orally and in writing
Embraces diversity: Fosters an inclusive workplace where diversity and individual differences are valued

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

Utilization of resources: Utilizes funds, staff and/or equipment economically and effectively.

Judgment: Exercises sound judgment, demonstrates awareness of work-related considerations in decision-making.

Growth and development: Attempts to improve competencies in job-related areas; seeks opportunities to develop professionally.

For Supervisors - Leadership: 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.

For Supervisors - Managing conflict: Ensures productive resolution of conflict; recognizes different viewpoints; brings conflict into the open and encourages those involved to find appropriate solutions.

For Supervisors - Managing performance: 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.

Overall rating

4.3 Overall rating: The overall rating is not required to reflect an average of the individual ratings as some may be weighted more than others. It should reflect the overall performance of the employee and should relate to the individual ratings.
Employee signature

Provide your first and last name to electronically sign your appraisal. This section may also be used to comment on the appraisal and any other observations recorded on this form. You may type or cut and paste up to 1,000 characters (about 4 pages of text). The icon pastes text copied from Microsoft Word.

Signature:

First name:

Last name:

Comments:

I understand that entering my first and last name below and submitting this form does not indicate agreement or disagreement but simply that the form has been discussed with my supervisor.

Comments to employee

Supervisor: Supervisor, Jeremy
Comments: Aimee, let's talk over the goals section before our meeting. We have some new conferences coming in that we need to discuss.

Date: 2010-04-14 11:28

Supervisor: Supervisor2, Cynthia
Comments: Call me and we'll collaborate on the text so we both choose different aspects of the project to mention.

Date: 2010-04-14 14:42

Routing

<table>
<thead>
<tr>
<th>Role</th>
<th>Name / Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originator</td>
<td>Employee, Aimee A - sent to supervisor</td>
<td>2010-04-10 11:18</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Supervisor, Jeremy D - returned to employee for editing</td>
<td>2010-04-13 13:59</td>
</tr>
<tr>
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<td>Aimee, let's talk over the goals section before our meeting. We have some new conferences coming in that we need to discuss.</td>
<td></td>
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</table>
Supervisor Signoff

- **Signature**: Choose an option to electronically sign and accept this appraisal.
- **Date of in-person appraisal**: Enter the date in the format mm/dd/yyyy.
- **Action**: 
  - Send to HR
  - Send to [Name] (lookup)
- **Comments to employee**: Input any comments to the employee that will display on all views.

Options for saving and submitting the form are available.
Payroll & Records Management Review

- Appraisals will be sent to Payroll & Records Management (HR) for review.
- After Payroll & Records Management review, the forms will be completed and update PeopleSoft with the overall rating.
- Prior forms will be available year round.
- A printable view will be available.

**DEADLINE** TO SUBMIT PERFORMANCE APPRAISAL FORMS TO PAYROLL & RECORDS MANAGEMENT IS: **4/01/2013**.
Future Enhancements for July 2013

- Ability to create an Initial Performance Review for new hires
- Ability to create a Performance Appraisal for an employee who has been out on a leave of absence
- Ability to make goal adjustments throughout the performance appraisal period
Contact Information

• Email:
  – hr-appraisals@udel.edu

• Phone:
  – (302) 831-8677
Questions & Answers