**Performance Appraisal Preparation Workbook 2019**

**Last Year’s Goals**

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| --- | --- | --- | --- | --- |
| **Goal** | **Success as measured by…** | **Degree to which I achieved the goal** | **What I learned** | **What I would do differently** |
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**Last Year’s Development Plan**

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| **Developmental**  **Objective** | **Success as measured by…** | **Degree to which I achieved the goal** | **What I learned** | **What I would do differently** |
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**My three most significant accomplishments last year were:**

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|  | **What was it?** |
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| **Why was it significant for you?** |
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|  | **What was it?** |
|  |
| **Why was it significant for you?** |
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|  | **What was it?** |
|  |
| **Why was it significant for you?** |
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**My Self-Rating of Core Competencies**

**Rating Scale (0 to 5 scale)**

**0=Does Not Meet, 1=Needs Improvement, 2=Mostly Meets,**

**3=Meets Expectations, 4=Exceeds Expectations, 5=Outstanding**

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| **ACCOUNTABILITY** | **My Self Rating** |
| Holds self and others accountable for measurable, high-quality, timely, and cost-effective results |  |
| Consistently demonstrates energy, enthusiasm, and maximum effort in completing responsibilities |  |
| Demonstrates flexibility in response to changing priorities |  |
| Accepts personal responsibility for own actions, including errors |  |
| Supports other team members by prioritizing and altering daily routines to complete assignments |  |
| Complies with established policies, procedures, and rules |  |
| Participates in cross-functional teams and works effectively with employees from diverse backgrounds |  |
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| **INITIATIVE** |  |
| Takes prompt action to accomplish tasks and meet goals and objectives |  |
| Completes assignments with minimal direct oversight |  |
| Utilizes equipment, supplies, and technology to achieve maximum efficiency |  |
| Recommends process improvements within department and organization |  |
| Collaborates with other employees and departments as needed |  |
| Actively participates in the development and achievement of team goals |  |
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| **PROBLEM SOLVING/DECISION MAKING** |  |
| Identifies and analyzes problems weighing the relevance and accuracy of available information and recognizing one's filters, privileges, biases, and cultural preferences |  |
| Generates and evaluates alternative solutions and makes effective and timely decisions |  |
| Reviews the effects and implications of decisions and takes appropriate follow up actions |  |
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| **QUANTITY/QUALITY of WORK** | **My Self Rating** |
| Pays close attention to detail |  |
| Strives to achieve accuracy and consistency in all tasks |  |
| Organizes work to achieve maximum productivity |  |
| Actively applies strategies and tactics that routinely deliver results |  |
| Follows all safety rules, proactively works to prevent accidents, and encourages the use of sound judgment in order to comply with departmental and UMMS safety policies and procedures |  |
| Produces a consistently high volume of work that also meets quality standards |  |
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| **SERVICE ORIENTATION** |  |
| Applies effective interpersonal and problem-solving skills when responding to clients |  |
| Treats all of our diverse internal and external clients with respect and courtesy |  |
| Understands the needs and expectations of diverse clients and anticipates how to fulfill them |  |
| Demonstrates cultural sensitivity and competence when interacting with clients, fellow employees, and guests |  |
| Takes personal responsibility applying proactive, solution focused approaches in responding to client needs |  |
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| **DIVERSITY & INCLUSION** |  |
| Understands how social group identities shape the settings in which we work |  |
| Demonstrates self-awareness and the ability to see other points of view, valuing diverse experiences and ways of knowing |  |
| Negotiates conflict and facilitates discussions with culture competence and cultural humility |  |
| Shows commitment to continuous learning/improvement in managing diversity |  |
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| **Leadership/Management (for those with supervisory responsibilities only)** | **My Self Rating** |
| Sets clear priorities, goals and expectations and provides timely, constructive, and balanced feedback in holding staff members accountable |  |
| Delegates effectively and empowers team members and flexes style when faced with diverse teams understanding and effectively managing complex group dynamics and diverse perspectives |  |
| Manages performance problems and team conflicts skillfully |  |
| Demonstrates effective mentoring, developing and motivating skills |  |
| Inspires and fosters team commitment, spirit, pride and trust and is attentive to the well-being of her/his staff |  |
| Takes a long-term view building a shared vision with staff in planning, decision making, and process improvement |  |
| Acts as a positive role model |  |
| Ensures that diverse, talented employees are appropriately recruited, selected, oriented, and acclimated to the organization |  |

**Proposed Goals for the Coming Year**

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| --- | --- | --- | --- | --- |
| **Specific goal** | **How is it to be Measured?** | **How will you Achieve it?** | **How is it Relevant to the needs of your department?** | **What is the Timeframe for completion?** |
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**Proposed Development Plan for the Coming Year**

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|  | **Developmental objective – What and why?** |
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| **Plan and timetable for completion?** |
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|  | **Developmental objective – What and why?** |
|  |
| **Plan and timetable for completion?** |
|  |
|  | **Developmental objective – What and why?** |
|  |
| **Plan and timetable for completion?** |
|  |