

EMPLOYEE NAME: _____

POSITION TITLE: _____

DEPARTMENT: _____

SUPERVISOR: _____

APPRAISAL PERIOD: _____

Guided Narrative Tool

(Recommended for employees in the same position, with the same supervisor for a minimum of 5 years)

GOAL SETTING: *Review Prior Year Goals*

Take time to re-visit the goals that were set for the performance appraisal period. Did the employee meet these goals? If so, provide a brief summary outlining how the goals were met. If not, consider and summarize the reasons why they were not met.

Step 1

Compare the employee's job description with the tasks the employee performs on a day-to-day basis. Do the two coincide? Are there differences that should be accounted for?

Step 2

Summarize the employee's strengths and accomplishments during the appraisal period.

Step 3

Summarize the employee's weaknesses or areas to improve on during the year ahead.

*****Note for Steps 2 and 3:** Some areas to consider in summarizing strengths and weaknesses are: Technical and professional knowledge, communication skills, work quality, service orientation, level of independent initiative, work reliability, fiscal responsibility.

“SMART” GOALS WORKSHEET

Specific – Measurable – Actionable – Realistic – Time Bound

WPI uses “SMART” Goals during the yearly performance appraisal process. These goals are intended to be re-visited by the employee and the supervisor regularly throughout the year so that progress toward achieving the goals can be monitored carefully. Please review the above “SMART” acronym and the example below before setting this year’s “SMART” goals.

Model: To (action verb) (single key result) by (target date) requiring (resources).

Example: If one of the employee’s goals was to become more proficient with Excel, converting that into a “SMART” goal would be:

To integrate the use of Excel in tracking employees and the training programs they attend by January 1, with the help of training programs offered through the ATC.

Specific	Become more proficient in Excel.
Measurable	Utilize Excel in tracking employee training programs.
Actionable	By attending training programs offered through the ATC, the employee will learn how to build an Excel database.
Realistic	The deadline for completing this task will be one year from now, which gives more than enough time to attend training programs, build a database, and integrate the use of the database into the workflow.
Time Bound	Complete by January 1, 2013 for next year’s appraisal process.

This goal has a specific end product and a deadline that is accomplishable. It is not vague, and will be easy to revisit over the course of the year for the purposes of tracking progress.

Goal 1: _____

Goal 2: _____

Goal 3: _____

“SMART” Conversion table

Specific	
Measurable	
Actionable	
Realistic	
Time Bound	

Please expand the table above as needed for additional goals, if applicable.

TRAINING CHECKLIST

Training and professional development sessions you'd like employee to attend in the coming year to accomplish their "SMART" goals:

Technology Training
(please specify) _____

Communication Skills

Writing Skills

Time Management/Organization

Project Management

Supervisory Training

Leadership Development

Please specify needs: _____

Please specify needs: _____

Wellness related

Other

(please specify) _____ (please specify) _____

Division Head Signature: _____

Date: _____

Supervisor Signature: _____

Date: _____

Employee Signature: _____

Date: _____

Has the employee elected to have his/her Self -Appraisal submitted with this review? Yes No

Has the employee elected to submit other supporting materials (i.e. emails, thank you notes, kudos) with this review? Yes No

Has the employee's job description changed, and has an updated description been submitted with this review? Yes No

Please be advised that this document will be placed in your personnel record.