

EMPLOYEE NAME: _____

POSITION TITLE: _____

DEPARTMENT: _____

SUPERVISOR: _____

APPRAISAL PERIOD: _____

Guided Narrative Tool – Self Appraisal

(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 you 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 your job description with the tasks you perform on a day-to-day basis. Do the two coincide? Are there differences that should be accounted for?

Step 2

Summarize your strengths and accomplishments during the appraisal period.

Step 3

Summarize your 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.

Step 4

Outline your “SMART” goals, using the model below:

“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 with your 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 your 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, I will learn how to build my own Excel database. |
| Realistic | My deadline for completing this task will be one year from now, which gives more than enough time to attend training programs, build my database, and integrate the use of the database into my 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 to attend in the coming year to accomplish your “SMART” goals:

Technology Training
 (please specify) _____

Communication Skills

Writing Skills

Time Management/Organization

Project Management

Supervisory Training
 Please specify needs: _____

Leadership Development
 Please specify needs: _____

Wellness related Other
 (please specify) _____ (please specify) _____

Is there anything your Supervisor can do to help you succeed and/or enhance your performance?
