Annual Performance Appraisal Program: Making the Process Work for You

Association of Business Administrators
Monthly Meeting
April 23, 2018
How Do You Make the Process Work For You?

- **PLAN & PREPARE**
  - Review your progress at achieving goals & professional development activities

- **DOCUMENT**
  - Complete Your Self-Appraisal

- **SHARE**
  - Discuss your contributions and professional development plans with your supervisor
Self-Appraisal: “Toot Your Horn”

- Give feedback on how you met goals and expectations
- Give feedback on your professional development efforts for FY18
  - How you demonstrated outlined competencies
  - Efforts undertaken to further professional development
- Identify professional development needs and desires for next year
Where Do I Start?

- Review goals, expectations, projects for FY18
- Collect data on your performance
  - Project goals and results
  - Monthly reports
  - Updates on work assignments, individual goals
  - Work-related metrics, stats
  - Feedback received from internal and external customers
- How did you address professional development plans?
Market Yourself!

- Cite specific examples of how you achieved established goals
- Describe results of your efforts
- Note areas where you took initiative and made improvements
- Discuss how your contributions impacted the department’s, school’s, or center’s goals
- Explain how you enhanced your skills, abilities
I customized the monthly budget reports given to Directors to include not only their monthly actual expenses by category and balances but also projected fiscal year expenses and revenues for their major programs based on the established program goals and activities. The directors indicated that this new report information enhanced their program planning and helped them to proactively make modifications to stay within budget.
I redesigned the receptionist area to more prominently and efficiently display our program materials. I proposed to the Director that we buy a monitor for the receptionist area to project information about our mission, upcoming programs and social media sites. My suggestion was accepted and I volunteered to design the slides displayed on the monitor. We received very positive feedback from our clients on the redesign. Program participation and traffic to our social media sites have increased.
Highlight what you did to enhance your professional development

- Formal or informal training
- Academic coursework
- Cross Training
- Project or Committee Work
- Professional Certifications
- Mentoring
- Member, Officer in Professional Associations
This year I volunteered to be a member of the department’s Website Redesign Team. I helped design the survey tool we used to solicit feedback on our website from our students, faculty, staff and external customers. The team also collected data on website usage, benchmarked best practices and presented our findings and recommendations in a written report to the Chair by deadline. Our major recommendations were implemented in the web redesign and our team received a written commendation from the Chair for our project results.
Professional Development Plan - Next Cycle

- What skills are critical for success in your:
  - position
  - department, school/center
  - career

- Do Gap Analysis

- What skills do you need to enhance?
Professional Development Plan – Next Cycle

- Discuss professional development plans to enhance job performance and/or career goals
  - Formal or Informal Training
    - Consider courses sponsored by the Division of Human Resources
  - Developmental Assignments
    - Assignment to Project Team or Committee
    - Train/mentor other co-workers
    - Design or revamp a program or process
  - Enhance competencies needed on job
  - Work on career goals
    - Consult Penn’s Career Resources (8-3400)
2018 HR Performance Appraisal Schedule

- June 1, 2018 – University deadline for completion of performance appraisals

- Check with your supervisor about deadlines in your department

- Use Online Performance Appraisal System to complete your self-appraisal
  
  https://portal.hr.upenn.edu/
For More Information or Assistance

- Consult with your supervisor
- Access the Human Resources web site at: https://www.hr.upenn.edu/myhr/payandperform/appraisal/performance
- Contact Staff and Labor Relations at 215-898-6093