Performance and Staff Development Program:
Making the Process Work for You

April 9, 2015
How Do You Make the Process Work For You?

- **PLAN & PREPARE**
  - Review your progress at meeting goals

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

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

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

- Review goals, expectations, projects for FY15
- 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 improved the budget planning process in my department by holding regular planning meetings with Directors four months before the budget proposals were due. These meetings enhanced my knowledge of our upcoming strategic goals and gave me an opportunity to work more closely with the Directors on cost and revenue projections and cost savings. Because of this enhanced process our financial office was able to complete more detailed budget proposals two weeks before the deadline.
Professional Development This Cycle

- 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 Association
This year I volunteered to be a member of the department’s Website Redesign Team. The team solicited feedback on our website from our students, faculty, staff and external customers, 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.
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 with Penn’s Career Services (8-3400)
2015 Performance Appraisal Schedule

- June 1, 2015 – University deadline for completion of performance appraisals
- Check with your supervisor about deadlines in your department
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 your school or center Human Resources representative

- Contact Division of Human Resources, Staff and Labor Relations – 215-898-6093