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| 1. **Employee Information** | | | | |
| **Employee’s Name:** | Sara Dunn | | **Employee ID #:** | 24369 |
| **Review Period:** | FY24 | | **Organization #:** | 5400 |
| 1. **Annual Evaluation Results:** Document performance including both results and behaviors. | | | | |
| *Current fiscal year major objectives agreed upon with line manager* | | *Current fiscal year accomplishments* | | |
| * Independently anticipate financial and administrative deadlines, processes, and needs of the group. * Conduct detailed analysis of financials and provide results through easy-to-use platforms. | | * Created cadence for review and analysis of financial information with teams. * Created custom PowerBI reports with new OFCO data set to have easy to access data for financial monitoring. | | |
| * Plan, organize, and execute project activities such as webinars, client meetings, workshops, and conferences. | | * Provided training on PowerBI tools, Planning 2.0, and the Pricing tool as needed to ensure team was informed of new updates. | | |
| * Independently manage subcontract creation and any maintenance throughout subcontract lifecycle. | | * Assisted with multiple subcontract modifications and maintained accrual schedule for multiple Purchase Orders. | | |
| * Provide Project Management resources to the group. Assist with ongoing and past research (not be a subject matter expert but to be aware of the work) and keeping related material organized and centralized. | | * Created conference and funding opportunity spreadsheet capturing relevant conferences to our team. * Shared information about process and tool changes to the team. * Assisted with the creation of multiple post cards for conferences. | | |
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| *Other major accomplishments:*   * Assisted with roll out of Planning 2.0 as a coach for the 5400 Directorate. | | | | |
| 1. **Line Manager’s Feedback** | | | | |
| * Sara has been an amazing asset for this team since Day 1. Her energy is amazing and helps lift all of us. * She is always asking questions and seeking ways to make our jobs easier. I also appreciate her strong sense of collaboration and team work. * I am impressed with the research she did to narrow down an affordable, effective news feed for the team. I use it daily now and am thankful for having this tool. * Sara’s willingness to get ahead of Planning 2.0 has been a life saver. I would never have been able to figure it out and thankful Sara took this task on head first as it allowed me (and likely other researchers) to focus on our research.   Some comments from peer review, including any suggestions for improvement, if any:   1. “She quickly learned the new Planning 2.0 EPM and Power Bi financial tools implemented during 2024 and has provided trainings and guidance for both systems to her Team/staff….She has great energy and really wants to provide the best support that she can to her manager and team. She is always asking “what else can I do to for my team”? 2. Sara tends to anticipate questions ahead of meetings which is great, but this also puts undue pressure and stress on her which can cause work burnout which I hope she avoids. Any financial related trainings would be beneficial to her growth. 3. She delivers clear, concise communication ensuring all team members are aligned and on track. She is always trying to innovative more efficient and time saving methods for our team members. She has a high standard for excellence | | | | |
| 1. **Major Performance Objectives for Next Fiscal Year:** State major objectives for next year. | | | | |
| * Become more familiar with cadence of planning cycle (forecasting, planning, monitoring, and updating) to anticipate needs of team. | | | | |
| * Become more familiar with Project Management principles to better serve the team. | | | | |
| * Become more familiar with Financial Tools, specifically Planning 2.0 to better monitor projects. | | | | |
| * Become more familiar with communication aspects of research being conducted to better help advertise work being conducted by team. | | | | |
| 1. **Areas for Growth, Development and Challenge:** List skills, knowledge, or attributes that need to be developed or strengthened. | | | | |
| * Take the Certified Associate in Project Management (CAPM) course and exam to become more versed in Project Management principles. | | | | |
| 1. **Overall Performance Rating:** | | | | |
| |  |  | | --- | --- | | |  | | --- | | **Successfully meets or exceeds expectations** |   **Enter the overall performance rating:** |  |  |  | | --- | --- | |  | Type “Yes” in the box to the left if a corrective action plan is required. | | | | | |
| **Performance Rating Definitions:** | | | | |
| **Needs improvement** – Employee does not meet the performance and/or behavior expectations, and/or demonstrates only a minimum level of proficiency in the competencies required in their job on a consistent basis. This rating also applied to an employee who may exhibit workplace behaviors which negatively impact the ability to be effective in their role, although goals may be achieved. Additional skill development, commitment, and/or change in behaviors are necessary. This rating describes the employee who may meet only the very minimum position requirements and/or behaviors and change is necessary. The evaluation should detail the changes necessary for improvement to ensure clear expectations are defined.  **Successfully meets or exceeds expectations** – Employee is currently successful in their role and consistently meets and may frequently exceed the high NREL performance expectations commensurate with their position within the laboratory. The expected behaviors include proficiency regarding judgment, interpersonal and communication skills, and other competencies required in their job. This rating describes the employee whose overall performance is successful and above. Any minor areas where performance gaps exist were counterbalanced by overall successful performance and behavior that consistently met or exceeded expectations. The rating can also apply to employees new in their jobs who may be learning or lack experience but, overall, are successful in their role with no significant gaps in performance or behavior.  **Exceptional** – Employee consistently exceeds the majority of performance expectations and goals, and demonstrates judgment and behaviors commensurate with their position within the laboratory. The expected behaviors include a high level of proficiency regarding judgment, interpersonal and communication skills, and other competencies required in their job. | | | | |

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| **Employee and line manager review the following items together and initial upon review.** | | |
| **Initial each item** |  |
| **SD** | **I have reviewed the** [**Commitment to Safety and Environmental Stewardship**](http://thesource.nrel.gov/esh/commitment.html) **and reviewed my ESH training requirements with my line manager.** |
| **SD** | **I have reviewed my required training plan with my line manager and have submitted necessary changes to** [**institutionaltraining@nrel.gov**](mailto:institutionaltraining@nrel.gov)**.** |
| **SD** | **I have discussed** [**NREL’s Ethics Handbook**](https://highpoint.nrel.gov/sites/iop/Documents/gen/fy21/77850.pdf) **with my line manager and understand my responsibilities in these areas.** |
| **SD** | **I have discussed cybersecurity requirements, including personally identifiable information, and physical security requirements, such as visitor access and control issues, with my line manager and understand my responsibilities in these areas.** |

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| 1. **Employee Comments (Optional)** |
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| 1. **Signatures** |

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| **Employee:** | **Sara Dunn** |  | **Date:** | **11/5/20204** |
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| **Employee’s Line Manager:** | **Mark Chung** |  | **Date:** | **11/4/2024** |

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| **Reviewing Manager:** |  |  | **Date:** | **12/16/2024** |