

- **Narrative Performance Review (Example from MIT)**

A. CURRENT RESPONSIBILITIES

Attach a current position description. If applicable, make note of any significant changes since last year's performance review.

B. PERFORMANCE ASSESSMENT

1. **Evaluate and discuss the employee's job performance.** Base your evaluation upon the position requirements, achievement of the goals established during the past year, and your assessment of the employee's accomplishments.

Overall, Caroline's performance to date has been well above average. In most areas, she has consistently met or exceeded expectations. Since she has been in the position for only 9 months, she is still heavily in the learning process. I have every expectation she will continue to master this position and be extremely successful.

2. **Are there areas of exceptional performance that should be particularly noted?** Provide specific examples.

As a new technical staff, Caroline's focus has been on developing her knowledge of the position and its complex responsibilities. She has been learning and absorbing both the concrete duties and the "business landscape" at a very fast pace. Her ability to assimilate new information is very high and extremely helpful in this position. She also has exceptional communication skills which she has demonstrated both with her Department Head and with others in her department and in the School. Caroline has already demonstrated that she has extremely high standards for her own performance. Her follow-through on new tasks has been flawless.

3. **Are there areas of performance needing more attention or improvement?** Provide specific examples.

Areas with less than exceptional performance are, I believe, absolutely the result of Caroline still being relatively new in the position. I believe she has already been highly effective in all areas of responsibility, but I expect that to increase as she goes through the whole cycle of her new position. The particular area where I hope to see measurable progress is working with those individuals she supervises. There are some sticky situations in her area which she has not yet been able to master completely.

4. **State and discuss the expectations and goals for the upcoming review period.** Give examples of how these goals can be met (e.g., training). How will you support the employee to accomplish these goals?

- a. *Continue intensive efforts to master the "technical" aspects of her position such that she is able to consider possible process improvements for activities on her 2nd time through a particular cycle.*
- b. *Develop deeper understanding of department, own role and strengths and weaknesses of the staff to allow for more effective management of staff*
- c. *Prepare for transition to new Department Head next July – identify areas where relationship development might be needed.*

C. PROFESSIONAL DEVELOPMENT PLAN

List specific activities the employee will do in the next twelve months as part of his/her professional development. How will you support the employee to meet these goals?

Continue monthly meetings with me as 1:1 information source

Pursue "mentor" relationship with one of the School AOs who have offered to do so

Set up 4-6 topic-specific conversations over the next year with more experienced technical staffs (from our department or others)

D. EMPLOYEE COMMENTS (OPTIONAL)

The employee may comment on the performance review in the space provided below.

This annual performance review will become part of your personnel file. Please sign below to acknowledge that you have received this document.

Employee's Signature:

Date:

Supervisor's Signature:

Date:

- Numerical Scale Performance Review Form

Job Description

Attach a current position description; if applicable, make note of any significant changes since last year's performance review.

If performance goals were set at the last performance review, attach a copy of these goals and comment on the employee's progress.

Performance Competencies (*Depending on position, some competencies may be more relevant than others.*)

5_Exceptional:	Performance is consistently superior and significantly exceeds position requirements.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4_Highly Effective:	Performance frequently exceeds position requirements.	
3_Proficient:	Performance consistently meets position requirements.	
2_Inconsistent:	Performance meets some, but not all position requirements.	
1_Unsatisfactory:	Performance consistently fails to meet minimum position requirements; employee lacks skills required or fails to utilize necessary skills.	
N/A_New/Not Applicable:	Employee has not been in position long enough to have demonstrated the essential elements of the position and will be reviewed at a later agreed upon date.	
1. Skill and proficiency in carrying out assignments <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. Possesses skills and knowledge to perform the job competently <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3. Skill at planning, organizing and prioritizing workload (For self and direct reports, if applicable) <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4. Holds self accountable for assigned responsibilities; sees tasks through to completion in a timely manner <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5. Proficiency at improving work methods and procedures as a means toward greater efficiency <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6. Communicates effectively with supervisor, peers, and customers <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7. Ability to work independently <i>Brief explanation:</i> <input type="text"/>		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

-- Note: only a part of the evaluation form

Performance Summary (attach additional pages as necessary)

1. List all aspects of employee's performance that contribute to his or her effectiveness.
2. List aspects of employee's performance that require improvement for greater effectiveness.
3. In what way is the employee ready for increased responsibility? What additional training will he/she need to be successful?

Goal Setting and Development Planning

4. List the employee's performance goals for the coming year:
5. How do these align with departmental goals?
6. List the employee's development goals for the coming year:
7. In the coming year, how will you provide guidance and assistance for the employee to accomplish his/her goals?

This annual performance review will become part of your personnel file. Please sign below to acknowledge that you have received this document.

Employee's Signature:

Date:

Supervisor's Signature:

Date:

- Self-Appraisal

Job Definition

1. Attach a current position description; if applicable, make note of any significant changes since last year's performance review.
2. Which position responsibilities do you view as most important? Why?
3. Have there been any special circumstances that have helped or hindered you in doing your position this year? If yes, what were the circumstances and how did they affect your work?

Accomplishments

1. List your most significant accomplishments or contributions during the past year. How do these achievements align with the goals/objectives outlined in your last review?
2. Since the last review conversation, have you performed any new tasks or additional duties outside the scope of your regular responsibilities? If so, please specify.
3. Describe professional development activities that have been helpful since last year (e.g., offsite seminars/classes, onsite training, peer training, on-the-job experience, better exposure to challenging projects).

Goal Setting

1. What are your goals for the coming year and what actions will you take to accomplish these goals?
2. What could your supervisor/manager do to support you in doing your job and accomplishing these goals?
3. What else would help you to do your job better and provide greater job satisfaction?

Development Planning

1. What kinds of professional development activities would you like to do during the coming year? (For more information, go to <http://hrweb.mit.edu/performance-development/goal-setting-developmental-planning/types-development-activities>)
2. What support or information do you need to complete these activities?

Personnel Evaluation Exercise

As a group, decide the **five most important criteria** and use them to evaluate your group members. Once you have written your name down, pass the paper to each of your group members so that you can **rate each group member on a scale of 1 to 5**, and give them **one constructive comment and one critical comment**.

- 1 - Fails Expectations
- 2 - Improvement Needed
- 3 - Meets Expectations
- 4 - Valued Contributor
- 5 - Exceeds Expectations

Evaluation For:

Evaluator:

Criteria:	Rating:	Additional Comments:
Positive Comment:		
Critical Comment:		

Evaluator:

Criteria:	Rating:	Additional Comments:

Performance Evaluation Sample

Positive Comment:	
Critical Comment:	

Evaluator:

Criteria:	Rating:	Additional Comments:
Positive Comment:		
Critical Comment:		