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2013 Employee Performance Appraisal Form

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| **Name** | Suganya Anbumani |  | **Date** | December 2, 2013 | | | | |
| **Position** | Senior Applications Developer |  | **Department** | | IT | | | |
| **Manager** | Heidi Sargent |  | **Period Covered** | | | 1/2013 | **to** | 12/2013 |

**Ratings and Definitions:**

* **Distinguished Performance (DP):** Displays the highest standard of performance in the job. The quality and quantity of work produced compares with the best in the company. Builds and maintains successful working relationships with others and is viewed as a leader throughout the company. Is a model of excellence for others.
* **Commendable Performance (CP):** Consistently exceeds, and at times far exceeds, all expectations of the job. Maintains an above average standard of performance in the quality and quantity of work produced. Builds strong working relationships throughout the company.
* **Fully Successful Performance (FSP):** Successfully meets, and at times exceeds, expectations of the job. Demonstrates the ability to execute major functions with limited guidance. The quality and quantity of work produced meets expectations. Maintains effective working relationships throughout the company
* **Partially Meets Performance Expectations (PMPE):** Demonstrates adequate performance in most areas of job responsibilities but needs improvement in some. May require above average supervision in one or more major functions of the job. Individual has the capacity to improve overall performance.
* **Does Not Meet Performance Expectations (DNME):** Results fail to meet expectations. Performance has declined significantly, or has not sustained adequate improvement since last performance discussion. May require above average guidance in one or more major functions of the job. This individual has the capacity to be fully successful. Has received a performance plan or a plan is forthcoming.
* **Developing Performance (DVP):** Employee is new to the position and is satisfying the standards and expectations of a person learning or becoming oriented to a new position.
* **Not rated (NR):** Review postponed until \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

1. **Major Responsibilities:**

***Description:***

*Describe the major responsibilities of the employee’s position.*

As a senior application developer, you are responsible for many data-driven initiatives

***Evaluation****:*

*Evaluate the employee’s performance including the way in which the employee carried out this responsibility (mode).*

* APL Historical – you have provided a solid solution for our partners in MPAOps to be able to complete validation as this final stage of the project comes to a close. You’re worked closely with team members to create this environment and maintained a high level of persistence and determination in a somewhat frustrating initiative. I am pleased with the collaborative nature of your work.
* AAMS – you continue to provide a high level of expertise and lead the support and development of this solution. In 2013, we provided thoughtful planning with our business partners and now have coordinated releases throughout the year. You were also instrumental in coordinating, developing, reviewing and releasing numerous ad-hoc updates as well. With our new team member in Oakland, you have also taken on a team lead role as well. You are a true SME in this space and have been rewarded on numerous occasions by our business partners for your attention to detail, flexibility and overall performance.
* Manager Portal – you continue to be a SME with this solution, handling issues as they surface.
* DataCentral – what an achievement! You redesigned the database design for this solution. You’ve included mapping from custodial, product and Tropt extracts and have loaded data. You’ve completed this work for NTXS, EdJones and Fortigent instances. Your careful design will allow us to reuse the code for different situations/instances of Vestmark. You worked closely with Phu to create Autosys jobs and alerts to monitor any failures/issues. You displayed thoughtful development when defining the parameters of this project. In doing so, our business partners have a sense of accomplishment as well with this centralized data store.
* Historical DB – stemming from DataCentral, you developed and guided the development of, the design, creation and loading of data for this initiative. You’re development efforts have established a foundation for future initiatives.
* Fortigent – you have completed the mapping of the extracts from Vestmark to DataCentral. You designed the database and have begun validation of the information. You are partnering with our associates in DataOps to ensure MARS data is received properly. This new database for Fortigent will enable future development and you have been able to improve the overall process for future business.

**Rating \_** **Distinguished Performance (DP)\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Impact: \_\_\_\_\_\_High\_\_\_\_\_\_\_\_\_\_**

**(High/Medium/Low)**

**Responsibility:**

***Description:***

*Describe the major responsibilities of the employee’s position.*

You support multiple applications within MPA including, AAMS, ManagerPortal, etc.

***Evaluation****:*

*Evaluate the employee’s performance including the way in which the employee carried out this responsibility (mode).*

You improved your skillset with ETL; increased your exposure to complex data needs with the Historical DB project; heightened our security through the JBoss upgrade, impacting several solutions and involving a lot of updates to JMS configuration, JAAS authentication and JSF upgrades. In addition to maintaining solutions you have also taken an active role in supporting our technical team members in Oakland; reviewing their work and providing a level of mentoring to both.

**Rating \_** **Distinguished Performance (DP)\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Impact: \_\_\_\_\_\_High\_\_\_\_\_\_\_\_\_\_**

**(High/Medium/Low)**

1. **Areas of performance needing more attention or improvement.**

There is an opportunity for you to continue to increase your knowledge of our MPA business. You always take into consideration the downstream impact to our business partners and in doing so, you ensure our solutions reflect as such. The introduction of another formal project management course this year will enable you to continue to utilize sound judgment with your own project deliverables.

1. **Areas of exceptional performance or strengths that should be highlighted. Include achievement of any goals set for 2013.**

* Learning new SSIS packages with ETL
* Infusion and increased exposure to middleware software – Jboss and increasing your knowledge in JMS, JAAS and JBoss
* Increased your DB design skills with projects such as DataCentral and Historical DB
* Team leadership – with the introduction of a new technical resource in Oakland, you have been instrumental in partnering and providing technical leadership

1. **Outline goals/expectations for 2014 as they relate to the employee’s position and the corporate goals of Grow Profitably, Build Efficiencies & Manage Risk, and Develop our People.**

* Expand knowledge of Project Management
* Expand knowledge of Spring Modules – consumption of webinars
* Continue to foster relationship with partners in MPA
* Continue as a technical liaison with AAMS, ManagerPortal and other MPA solutions
* Implement new technologies enabling you to grow technically and helping technical team members
* Improve Java technical knowledge

1. **Highlight learning events attended by the employee and how they have utilized the knowledge gained through these events.**

By attending the Project Management Fundamentals course offered internally, this spearheaded an interest to learn more. Project management has enabled you to parse through the many demanding priorities. Your knowledge has allowed you to be more thoughtful in planning and estimating your work as well as the work of others.

# Overall Summary of Performance:

Your performance in your current role as a Senior Application Developer is outstanding. You constantly take it upon yourself to analyze and review how to improve a current situation or deliverable. Your work is precise and the quality of your work exceeds my expectations. I have seen you expand your comfort levels and are more willing to communicate updates during our MAT Working Session and this ties in nicely with maintaining strong verbal and written communication skills. You are dependable and I can count on your to stick with a challenge until you are satisfied with its resolution. You are cooperative and quite adaptable to the ever-changing environment we live in each day at the office. You always maintain a strong customer focus which is key with our business partners. I can count on you to meet your exceed goals with limited to no supervision. You work well independently and have strong organizational and time management skills. You display enthusiasm and initiative every day and you shine among your peers within our team.

1. **Overall Rating**

**(Check one)**  **Distinguished Performance**

**Commendable Performance**

**Fully Successful Performance**

**Partially Meet Performance Expectations**

**Does Not Meet Performance**

**Developing Performer**

**Not rated; next review scheduled for \_\_\_\_\_\_\_\_.**

**Employee Comments:**

**Signatures:**

**Employee’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Signature confirms receipt and review of appraisal; it does not indicate agreement or disagreement with the appraisal.

A copy of this document will be placed in your employee file.

## Manager’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_