

Performance and Staff Development Program Memorandum Template

(In lieu of completing the Performance and Staff Development Plan, the supervisor can give the staff member a memorandum summarizing performance expectations, performance results, and goals for upcoming cycle.)

TO: Staff Member's Name
Staff Member's Penn ID Number (for data entry purposes)

FROM: Supervisor's Name (*supervisor should also sign the memorandum)
Supervisor's Penn ID Number (for data entry purposes)

DATE: Date memorandum is given to staff member

RE: Performance and Staff Development Feedback

This memorandum summarizes your performance results for the period (*enter begin and end dates of cycle, e.g., 6/30/xx – 6/30/xx*) and the performance goals and expectations for the upcoming appraisal cycle. Your overall performance for this appraisal cycle is summarized below.

Summary of Performance: (Check the one category that best describes the staff member's overall performance)

Staff member's performance consistently exceeds the established goals/expectations for the position and is clearly outstanding overall.

Staff member's performance consistently meets and frequently exceeds all established goals/expectations for the position.

Staff member's performance consistently meets established goals/expectations for the position.

Staff member's performance meets some, but not all, established goals/expectations for the position and improvement in specific areas is required.

Staff member's performance is unacceptable for the position and significant improvement is required.

During this current appraisal cycle you were expected to meet the following goals and expectations:

- *Summarize goals and expectations given to staff member for this cycle. Refer back to the previous Performance and Staff Development Plan, performance letter or memorandum.*
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The following summarizes your performance results for this cycle in relation to the established performance expectations and goals. This summary also cites examples of your results, where appropriate.

Provide a summary of staff member's overall performance results in relation to performance expectations and goals. Cite specific examples of results from your observations and documentation.

In the coming appraisal cycle, you will be expected to meet the following performance goals and expectations:

- **Summarize goals/expectations for coming cycle and include timeframes for achieving these goals. Can include routine duties, special assignments and projects and developmental activities. If staff member's overall performance is unacceptable or meets some but not all goals, cite areas for improvement in this section.**

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In addition to the above goals, the following competencies are vital to your success in this position and/or will enhance your professional development: ***cite relevant competencies, refer to listing in Performance and Staff Development Plan for descriptions.*** You can enhance your development of the noted competencies by... ***make suggestions, as needed, on methods to improve in competency areas, e.g., taking a training course of presentations, participating on a project team.*** ***You should also make comments on competencies the staff member is successfully demonstrating.***

Thank you for your efforts and contributions. I will be meeting with you again by (***date of next review***) to review your progress at meeting your performance expectations. If you have any questions about this memorandum or your performance expectations for the coming cycle, please consult with me.

*Staff Member Signature & Date _____

*My signature indicates that the Performance Memorandum has been reviewed with me and I have received a copy. It does not necessarily indicate my concurrence with the Performance Memorandum.

Administrative Signature & Date _____

**Sr. Business Officer Signature & Date _____

*****Signature of Senior Business Officer is required if staff member is in any level of the following job titles: Financial Coordinator, Grants Coordinator, Business Administrator, Business Manager, Grants Manager and Manager of Administration and Finance.***

Staff Member's Comments (Optional): The staff member may submit written comments on any aspect of the performance appraisal process. When completed, the comments should be given to the supervisor. The document will be forwarded to Human Resources/Staff and Labor Relations and will become a part of the staff member's official personnel file. If the staff member wishes provide comments, s/he should check the following box. []