

**Making the Performance Appraisal
Process Work for You**

Performance and Staff Development Program

Performance and Staff Development Program Goals

- **Provide accurate, written feedback on performance and accomplishments for the appraisal cycle**
- **Establish performance goals/expectations for coming appraisal cycle**
- **Address professional development needs and learning goals using competencies or other feedback**

Prepare for Appraisal Meeting

- **Complete Self-Appraisal Worksheet**
 - **Use the Online Performance Appraisal System at <https://portal.hr.upenn.edu/>**
 - **Collect performance data from your files**
 - **Review goals, expectations, projects for this appraisal cycle**
 - **Assess progress at meeting goals, cite specific examples**
 - **Respond to competencies, professional development needs identified by supervisor**
 - **Discuss professional development needs for next cycle**

Complete the Self-Appraisal

- **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

Self-Appraisal Sample Entry

- **Took initiative to learn Access, then used it to create a new applicant flow report for Admissions. The department uses the new report data to evaluate and refine recruitment strategies and outreach.**

Self-Appraisal Sample Entry

Supported the new monthly undergrad lecture series by: securing locations, dates and catering; accurately preparing all handouts and materials at least one week prior to each event; marketing the series to undergrads by drafting and distributing emails; and registering students.

Compiled, analyzed evaluation survey data for the series and submitted final evaluation report to the Director within one month of the last lecture in the series. I received written positive feedback and a 4.9/5.0 average evaluation rating on logistics for the series.

Professional Development

- Discuss professional development activities 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
 - Train/mentor other co-workers
 - Design or revamp a new program or process
 - Enhance competencies needed on job
 - Work on career goals
 - Consult with Penn's Career Coach (8-3400)

<https://www.hr.upenn.edu/myhr/learning/career/coaching>

Before the Appraisal Meeting

- **Review Self-Appraisal Worksheet and Job Description**

- **Jot Down Notes and Questions to Cover in Meeting**

At the Appraisal Meeting

- Engage in active listening
- Be aware of your non-verbal responses
- Be open to feedback and receptive to new ideas
- Take notes
- Give your feedback and ask questions
- Discuss your professional development needs
- Ensure that you understand the goals for the coming cycle

After the Appraisal Meeting

- **Review Performance Appraisal**
- **Get clarification, if needed**
- **Electronically sign appraisal via the Online Performance Appraisal System**
- **Submit comments via the online system, if desired**
- **Review goals throughout the year**

During the Appraisal Cycle

- Regularly review performance goals to assess your progress
- Regularly update your supervisor on your progress
- Keep records of projects, accomplishments, feedback
- Clarify goals as needed, especially if goals change during the year
- Enhance competencies identified
- Address professional development goals

Performance Appraisal Schedule

- **June 1, 2017 – University deadline for completion of performance appraisals**
- **Check with your supervisor about when your self-appraisal is due**

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-management-programs>
- **Contact your school or center Human Resources professional**
- **Contact Division of Human Resources, Staff and Labor Relations – 215-898-6093**