

Employee Guidance Sheet

The Annual Performance Review Summary combines:

- **Your annual self assessment:** This is your opportunity to present your thoughts on your performance and career-related accomplishments. If you do not complete this assessment, this will be a factor in your performance rating.
- **Your supervisor's annual review** of your performance, accomplishments and progress.

Following are instructions for the employee sections of the form.

For Performance Year Being Reviewed

1a. Employee Goals

- Copy your goals from last year's annual performance review form ("Employee Goals" section under "For Next Performance Year") and add any updates or new goals set during the year. Look in pmp.lbl.gov for last year's copy of your review.
- Include career development goals if desired. You or your manager may have initiated a conversation about career goals during last year's performance review conversation or sometime during the year.

2a. Performance Summary

- Briefly describe your accomplishments regarding your position responsibilities and performance goals for this period. Comment on the impact of these accomplishments (the value of your efforts to your department, division, or the Laboratory as a whole).
- Highlight noteworthy accomplishments regarding your job development and career development goals, as well as other accomplishments that reflect on your professional or technical standing.
- If you and your supervisor discussed particular performance issues this year, recap those issues here, along with any progress you have made toward improvement.

3a and 4a. Areas of Strength and Areas for Development

List several of your most valuable strengths and areas where you need further development. Think about *how* you performed, more than what you accomplished. Focus on a particular skill, way of doing the work or quality that enabled, enhanced or diminished your results.

5a. Safety

List your most noteworthy safety accomplishments. You may want to indicate whether you have:

- A current Job Hazards Questionnaire (or equivalent) on file in the Work Planning and Control (WPC) database
- Completed required training in the WPC or Berkeley Lab Training database
- Followed your Division Integrated Safety Management (ISM) Plan and the five core ISM functions
- Worked safely to prevent accidents at all times
- Adhered to the Lab's "Stop Work" Authority (if applicable)
- Participated in any of the Lab's personal safety training and/or employee volunteer responder programs, such as Building Emergency Team (BET) and Community Emergency Response Team

Recap any safety issues you and your supervisor discussed this year and any progress toward improvement.

<p>6a. Diversity and Inclusion</p> <p>If applicable, briefly describe:</p> <ul style="list-style-type: none"> • Diversity activities, such as Laboratory or Division council, committee and/or work group, attended an event, such as the Annual Cultural Fair, or diversity conference; participated in focus group, implicit bias training, Employee Resource Group, such as LGBTQ or Disability and Inclusion or selection committee) • Inclusion activities (e.g. ensured others had an opportunity to share during a meeting, solicited diverse perspectives from others, used an open door policy, or helped new staff acclimate to the Laboratory)
<p>7a. Supervisory/Host Responsibility</p> <p>If applicable, provide the number of staff members you directly supervise/host in each category.</p>
<p>7b. Supervisory/Host Performance</p> <p>If applicable, summarize your performance as a supervisor, including your performance management and employee development efforts.</p>
<p>8a. Laboratory, Professional & Community Service</p> <p>If applicable, briefly describe:</p> <ul style="list-style-type: none"> • Lab-wide, divisional, university and other committee work: committee name, your role (e.g., facilitated meetings, responsible for agenda/meeting reports, served on committee), special accomplishments • Professional service activities, such as speaking engagements; service as an editor or reviewer for scholarly journals or other publications; service to universities, scholarly or professional societies, educational or governmental agencies; consulting service to clients, private corporations or non-profit organizations; and interlocation appointments • Community service activities that benefit the Laboratory and/or science • Other service-oriented activities (e.g., taking on extra duties in a coworker's absence, mentoring, contributing to a staff member's education)
<p>9a. Publications, Reports</p> <p>If applicable, list in order of significance. If not yet published, indicate status (e.g., submitted, accepted, etc.). Include:</p> <ul style="list-style-type: none"> • Publications: Refereed journals, invited review articles, book chapters, peer-reviewed and non-peer-reviewed conference proceedings (no abstracts), and other articles -- name and full bibliographical citation or equivalent reference • LBNL reports: LBNL report number
<p>10a. Invited Talks and Conferences</p> <p>If applicable, list invited talks and conferences in this performance year.</p>
<p>11a. Proposals Funded or Submitted</p> <p>If applicable, provide information requested for each proposal. Do not include proposals planned or in progress but not yet submitted.</p>
<p>12a. Knowledge and Technology Transfer</p> <ul style="list-style-type: none"> • Intellectual Property • Patents: patents, invention disclosures -- name, one sentence description, date issued and licensing information
<p>13a. Awards & Honors</p> <p>If applicable, provide the award name and a brief description, including how the selection was made (e.g., selected by a panel of specialists in field). Include:</p> <ul style="list-style-type: none"> • Prizes, fellowship, honors, commendations, special lectureships • Membership in honorary societies • Fellow-grade membership in scientific societies • Laboratory awards

For Next Performance Year

14a. Employee Goals

List your recommendations for:

- **Performance goals** your position needs to accomplish, such as research or project goals, presentations, committee service, professional activities, etc.
- **Job development goals**, which are the skills or development you need in order to achieve your performance goals, such as taking a course in presentation skills or laboratory management.
- **Career development goals** to prepare for a desired future role, such as networking activities, on-the-job organizational and leadership experiences, or education and training. If you would like to have a career development conversation with your supervisor as part of your annual review, complete and submit a Career Development Plan in addition to this form, and summarize your career development goals in this section.