



All employees who are not represented by a union and their supervisors should complete this form.

**Instructions:**

**Employee:** Insert your name in the footer below and complete the "Employee" self-assessment sections (tan color) to document your most notable accomplishments and impact in this performance year. **Use of bullet points is strongly encouraged.** If certain sections are not applicable to you, leave them blank. For additional information, see the Guidance sheet available on the Performance Management website (click on "Performance Management" in the A-Z Index).

**Supervisor:** Complete the "Supervisor" sections (blue color) and provide a rating in the "Overall Rating" section. Provide evaluative comments on the employee's overall performance, most notable accomplishments and impact, and areas for development and improvement, if any. **Use of bullet points is strongly encouraged.** For additional information, see the Guidance sheet available on the Performance Management website.

Name:	Marie XXX	Division/Dept:	XXX
Employee ID:	XXXXXXXX	Job code:	XXX
Job title:	Administrative Specialist	Date prepared:	June 10, 2017
Supervisor:	Mark XXX		
Period covered from:	July 1, 2016	Period covered to:	June 30, 2017

<b>For Performance Year Being Reviewed</b>	
<b>1a. Employee Goals</b>	
<b>Employee:</b> List the goals you needed to accomplish in this performance year, including:	
<ul style="list-style-type: none"> <li>• <b>Performance goals:</b> position expectations and goals</li> <li>• <b>Job development goals:</b> skills or development needed in order to achieve performance goals</li> <li>• <b>Career development goals:</b> broader goals for your long-term learning and growth (optional)</li> </ul>	
<b>Performance goals:</b>	
<ul style="list-style-type: none"> <li>• Oversee collection and entry of data generated by field staff and received from laboratories; ensure data collected is accurate and complete.</li> <li>• Manage and analyze data, including preparation of tables and graphs.</li> <li>• Assist program leaders with interpretation and presentation of data.</li> <li>• Prepare annual data volume report and tables by [date].</li> </ul>	
<b>Job development goals:</b>	
<ul style="list-style-type: none"> <li>• Take online time management course; apply skills learned to improve time management.</li> </ul>	
<b>1b. Employee Goals</b>	
<b>Supervisor:</b> Indicate whether you agree with the goals listed for this performance year. Provide input or list additional goals as needed.	

Employee ---- Marie XXX

**2a. Performance Summary**

**Employee:** Describe your most significant accomplishments and impact in relation to your performance goals. Also describe improvements you made on any performance issues that you and your supervisor discussed this year.

The following accomplishments contributed to our group goal of delivering accurate, timely and meaningful reports to the Divisions:

- Regularly communicated with field staff to ensure that data was received on time, reviewed deliverables for quality, and uploaded files into our data management system in a timely manner.
- Met all deadlines for reports and prepared the necessary tables and graphs, including special requests.
- Completed the annual data volume report and tables one week in advance.
- Worked with XXX and XXX to help them prepare for Division management presentations. I received feedback from both of them that my input helped them to better understand the data and my tables and graphs were very effective.
- Took the time management course and applied what I learned to improve how I track projects and respond to emails. This is saving me several hours a week, which has helped me to meet our report deadlines.

**2b. Performance Summary**

**Supervisor:** Evaluate the employee’s performance, top achievements, and areas for development including:

- Overall statement on the employee’s performance this year, particularly in relation to goals.
- Four to six most significant accomplishments and impact.
- Improvements made on any performance issues that you and the employee discussed this year, and the most critical areas to focus on for the coming year.

**3a. Areas of Strength**

**Employee:** List several of your most valuable strengths.

- Responsive
- Enthusiastic
- Reliable

**4a. Areas for Development (or Improvement)**

**Employee:** List several areas where you need further development.

- Communication skills
- Database management

**3b. Areas of Strength**

**Supervisor:** Indicate whether you agree and add your own perspective.

**4b. Areas for Development (or Improvement)**

**Supervisor:** Indicate whether you agree and add your own perspective.

Employee ---- Marie XXX

**5a. Safety**

**Employee:** Describe your efforts this year to enable a positive safety culture at work and to protect yourself, team, division, Laboratory and public. Include accomplishments related to identification, evaluation, control, prevention, and/or mitigation of potential hazards. Also indicate if you participated in any of the Laboratory’s opportunities to improve safety (e.g., Division/Laboratory Safety Committee, “safety minute” presentations in meetings, ergonomic advocate program, fire extinguisher use and/or first aid training, employee volunteer responder programs such as Building Emergency Team (BET) and Community Emergency Response Team (CERT)).

I maintained my Job Hazards Questionnaire, took required safety training, and also took the WorkSmart Ergonomics course last February. Through my training, I learned how to make some changes that eliminated the ergonomics issues I was experiencing.

**5b. Safety**

**Supervisor:** Indicate whether you agree and whether the employee has met your expectations for safety. Add comments if necessary.

**6a. Diversity and Inclusion**

**Employee:** Describe how you contributed to and/or participated in diversity and inclusion activities in your Division or for the Laboratory. Some examples may be (but are not limited to): ensured staff/everyone in meeting had opportunity to share his/her perspective; solicited diverse perspectives on issue from staff/others; attended a job fair, diversity conference or event; participated in a diversity council, focus group, implicit bias training, selection committee, Employee Resource Group; etc.

I participated in the Diversity and Inclusion annual cultural fair and XXX focus group to learn more about the diverse perspectives at the Lab.

**6b. Diversity and Inclusion**

**Supervisor:** Indicate whether you agree and/or provide evaluative comments.

Employee ---- Marie XXX

<b>7a. Supervisory/Host Responsibility</b>	
<b>Employee:</b> If applicable, indicate the number of individuals you directly supervise or host in each category.	
	Postdoctoral fellows and scientists
	Research associates and technicians, etc.
	Graduate students
	Affiliates (Guests)
	Supervisors
	Operations and administrative employees
<b>7b. Supervisory/Host Performance</b>	
<b>Employee:</b> If applicable, summarize your performance as a supervisor. Include your efforts: to ensure that employee performance and conduct adhere to applicable requirements and policies, and to encourage employee development.	
<b>7c. Supervisory/Host Performance</b>	
<b>Supervisor:</b> If applicable, indicate whether you agree and/or provide evaluative comments.	
<b>8a. Laboratory, Professional and Community Service</b>	
<b>Employee:</b> Briefly describe your laboratory/university/professional/community service and/or committee work.	
Coordinating the fundraising campaign for XXX charity gave me more experience with negotiating and meeting management. I have applied what I've learned to interacting with field staff members when issues come up.	
<b>8b. Laboratory, Professional and Community Service</b>	
<b>Supervisor:</b> Indicate whether you agree and/or provide evaluative comments.	
<b>9a. Publications, Reports</b>	
<b>Employee:</b> If applicable, list in order of significance, and cite only items not submitted on previous self-assessments	
<ul style="list-style-type: none"> <li><b>Order of citation information:</b> author(s), year, title, journal, DOI</li> </ul>	
<b>Journal Articles: Published, Accepted, or In Press (include DOI):</b>	
<b>Journal Articles: Submitted, In review, etc.:</b>	
<b>Other published works (e.g. book chapters, published reports, etc.):</b>	
<b>9b. Publications, Reports</b>	
<b>Supervisor:</b> If applicable, provide evaluative comments on the employee's accomplishments, and identify areas for improvement.	

Employee ---- Marie XXX

**10a. Invited Talks and Conferences**

**Employee:** If applicable, list invited talks and conferences in this performance year.

- **Order of citation information:** author(s), year, title, meeting/conference name, date(s)

*Invited, keynote or plenary presentation (at nationally/internationally recognized professional scientific meetings/forums, as a university distinguished seminar, etc.)*

*Contributed oral or poster presentation at professional scientific meetings or forums*

**10b. Invited Talks and Conferences**

**Supervisor:** If applicable, provide evaluative comments.

**11a. Proposals Funded or Submitted, and Active Projects:**

**Employee:** If applicable, list proposals funded or submitted, and current projects which received funding during this review period. This includes projects where you have financial oversight, however may not be the PI (add more rows, if necessary).

Type of Proposal	Sponsor	Annual Amount You Manage	Role in Project PI/Co-PI /Senior Personnel	Funded (F) or Submitted (S) or Ongoing (O)

**11b. Proposals Funded or Submitted**

**Supervisor:** If applicable, provide evaluative comments on the impact of the funded proposals.

**12a. Knowledge and Technology Transfer**

**Employee:** If applicable, cite accomplishments in the following areas that have occurred during this review period. Cite only those not submitted on previous self assessment.

- Knowledge and/or technology transfer accomplishments, such as intellectual property, patents, software releases etc. Describe significance of top accomplishment/s.

**12b. Knowledge and Technology Transfer**

**Supervisor:** If applicable, provide evaluative comments on the employee’s accomplishments, and identify areas for improvement.

**13a. Awards and Honors**

**Employee:** If applicable, provide award name and brief description, including how selection was made.

Employee ---- Marie XXX

**13b. Awards and Honors**

**Supervisor:** If applicable, provide evaluative comments on the importance of these accomplishments.

**For Next Performance Year**

**14a. Employee Goals**

**Employee:**

List your recommended goals for the next performance year, including:

- **Performance goals:** position expectations and goals
- **Job development goals:** skills or development needed in order to achieve performance goals
- **Career development goals:** broader goals for your long-term learning and growth (optional)

See Next Steps below for directions on how to submit at [pmp.lbl.gov](http://pmp.lbl.gov).

**Performance goals:**

- Prepare annual data volume report and tables by November 1.
- Revise figures in quarterly and annual reports as needed.

**Job development goals:**

- Develop communications skills by taking training courses.

**Career development goals:**

- Take on more complex assignments in my current job that will increase my understanding of database management.
- Talk with database managers who have successfully balanced the demands of moving into a management position and raising young children.
- Network with successful database managers to explore whether an advanced degree will be needed to reach my overall career goal and to identify any other skills or experiences I will need.
- Begin taking courses toward a bachelor’s degree in database management.
- Find a mentor who I can meet with regularly to discuss my progress on my career development plan.

**14b. Employee Goals**

**Supervisor:** Indicate whether you agree with the goals listed, and/or add or revise goals as needed.

**15. Laboratory, Division or Group Goals**

**Supervisor:** List the broader institution and/or research goals the employee needs to support in the next performance year, if available and relevant to the employee’s job.

See Next Steps below for directions on how to submit at [pmp.lbl.gov](http://pmp.lbl.gov).

Employee ---- Marie XXX