

## SAMPLE PERFORMANCE REVIEW NARRATIVE

Jane Doe, XYZ Director

Performance Review Narrative – Supervisory/Managerial Employee

Review Period: March 1, 2007-February 29, 2008

### UNIT PERFORMANCE – Fully Successful

- **Strategic and Significant Projects (In support of implementation of the department and Institute Strategic Plans)**
  1. Created and implemented a XYZ campus-wide process
  2. Provided timely submission of reports and data for XYZ Audit
  3. Developed a XYZ Department Policy to facilitate emergency preparedness planning
  4. Implemented and piloted an electronic accounting database for the XYZ Department
  5. Provided leadership for the redesign of the XYZ Department website
- **Efficient Business Practices**
  1. Continued efficiency in department training programs administration
  2. Maintenance of XYZ department's contract/grant database

### PERSONAL PERFORMANCE – Fully Successful

- **Internal/External Customer Relations**
  1. Implemented pilot job rotation program for the XYZ Department.
  2. Personally resolved 74 customer consultations, and reviewed actions of all 175 documented customer consultations completed by the XYZ Team
- **Leadership**
  1. Continued service on eight internal department committees and Institute committees
  2. Provide appropriate development opportunities for XYZ department employees
- **Personal Growth (Development)**
  1. Completed reading books; *Good to Great and Leading Talents, Leading Teams*
  2. Received ABC Certification
  3. Attended the ABC National Conference
  4. Elected to QRS Board of Directors

### GOALS FISCAL YEAR 2009

- Piloting a department-wide employee cross training initiative for the XYZ department

## SAMPLE PERFORMANCE REVIEW NARRATIVE

**John Doe, Administrative Assistant**

**Performance Review Narrative – Non-Supervisory Employee**

**Review Period: March 1, 2007-February 29, 2008**

### **STRENGTHS - Responsibilities/Tasks that are “Fully Successful”**

- Customer service delivery and teamwork
- Coordinating travel arrangements and processing expense statements for XYZ Department
- Tracking XYZ department expenses and coordinating with Budget Officer on appropriate completion of transactions and the reconciliation process

### **CHALLENGES - Responsibilities/Tasks that “Need Improvement”**

- Files should be organized by developing a standard file format for the various types of files, and filing documents by date order within each file folder. Will develop standards and specific requirements for implementation in FY'08.
- Consistency in maintaining the office hours of 8:00am-5:00pm and taking a one hour lunch from 12:00pm-1:00pm
- Mastery of essential software (MS Word, Access, Excel, PeopleSoft)

### **DEVELOPMENT PLAN**

- Training on MS Word, Access, Excel, PeopleSoft
- Review all internal processes to become more efficient with procedures
- Enroll in the Office Professional Certificate Program through OOD

### **ADMINISTRATIVE PROJECTS FOR FISCAL YEAR 2009**

- Organizing current files in a more efficient manner, and creating an electronic index of all XYZ Department files
- Purging and Archiving relevant XYZ Department files