

Indiana University Kokomo

EMPLOYEE PLANNING AND DEVELOPMENT WORKSHEET

Name: _____

Time period
under review: _____

Title/rank: _____

Date this report
submitted: _____

Supervisor: _____

DIRECTIONS

Completing this worksheet is an important part of the evaluation of your job performance. It assures that your assessment of your performance is considered; it helps make your appraisal discussion more productive, and it permits you to highlight your strengths and major contributions prior to meeting with your supervisor.

Your comments should show a relationship to the following objectives:

- Satisfactory performance of assigned work duties, noting increased efficiencies, additional duties, enhanced working conditions and/or other improvements.
- Successful achievement of agreed-upon key objectives during the review period; completion of unanticipated assignments.
- Evidence of appropriate utilization of a broad range of managerial skills such as planning, supervision, decision-making, professional development and recognizable improvements in other requisite job aspects.
- Demonstration of a positive work attitude, enthusiasm for new concepts, positive interaction with constituents, and willingness to strive for completing assignments and meeting objectives.

You should have at least two weeks to complete this worksheet. Your department head will examine it before completing a Performance Review and Development Plan. This latter document along with your Planning Worksheet will be available to you during the appraisal discussion. After the review, both forms are placed in your personnel file where they are available to you upon request.

SECTION I. Major accomplishments and annual objectives: Highlight your contributions during the period under review and relate them to each of your annual objectives. Also relate the accomplishment of a major task or the completion of a difficult assignment that was not outlined in your established objectives.

SECTION II. Regular job description: Briefly summarize the assignments of your position that required significant time in the last year and you believe warrants recognition. THIS SECTION IS OPTIONAL.

SECTION III. Strengths: Review each activity in which you invested considerable time and note any personal strengths or abilities which were important in the completion of the task or assignment. Also note any ideas, suggestions or time saving measures that you initiated that made a difference in the past year.

SECTION IV. Performance roadblocks: Note situations that exist that make you less effective than you could be, such as a need for training in some specific area, inadequate information or communication, difficulties with other departments, lack of personnel, resources, technology, etc.

SECTION V. Other considerations: If there are any problems, concerns, or performance related issues that require discussion at your review please list them here.