***-----This period -----***

**A. Overall rating:**

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| --- | --- | --- | --- | --- | --- |
| **Annual period:** |  |  |  |  |  |

\*By checking Needs Improvement or Unsatisfactory, you must complete a Performance Improvement Plan [(PIP)](http://hrweb.berkeley.edu/performance-management/forms) for this employee

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| --- | --- | --- | --- |
| **Probationary period:** |  |  | **Period end date:** Click here to enter a date. |

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| **B. Top 3-5 Goals & Expectations *for this review period*** Goals at the start & during the period. Comments at the end of the period |
| 1. Regular reporting of financial results – internal    1. Independently issue accurate financial reports within 5 business days after month-end close.    2. Reports passed through established accuracy checks before being sent out.    3. If errors are discovered, corrections sent out promptly (within x days) Comments   Exceeds Expectation Example: Anne consistently takes a leadership role to facilitate on time reporting and proactively works with the management team to communicate deviations and errors when discovered.  Meets Expectation Example: Anne regularly prepares the 6 reports designated as month end reconciliations. She independently checks and self edits her work. When deviations and errors are discovered, she promptly communicates these exceptions to me. I have asked her to start communicating these discoveries to our greater management team.  Needs Improvement Example: Anne cannot work with limited supervision. Anne does not uncover obvious errors and mistakes from her reports. She is not always meeting the deadlines while preparing the 6 reports designated as month end reconciliations. I have been coaching Anne to find ways to to be more receptive to trying ideas presented to her in an effort to help perform the job better. |
| 1. Regular financial updates to campus    1. Independently submit regular forecasts and variance analysis by or before due date.    2. Reports passed through established accuracy checks before being submitted.   Exceeds Expectation Example: Anne prepares the reports on time and proposes new services or improved ways of tracking stakeholders’ needs across campus. I am constantly receiving positive accolades from internal and external customers or co-workers for her excellent work.  Meets Expectation Example: Anne prepares the reports on time and keeps track of other stakeholders’ needs across campus. Proactively reaches out to them. I am constantly receiving positive feedback from campus counterparts.  Needs Improvement Example: This goal unfortunately was not met. Terry needed to set a higher priority on timing of the reports so that the school and campus can meet their reporting goals. I offered to reduce other areas of her workload to help focus on this goal but this offer was declined. Anne does not recognize the value in reaching out proactively to her campus counterparts.  Comments |
| 1. Ad hoc financial and data analysis    1. Requests are acknowledged in 24 hours, and delivery deadlines met    2. Develop familiarity with key systems (for new to UC position) within 6 months of start date.       1. Data available       2. Appropriate uses   Exceeds Expectation Example: Anne consistently demonstrates a willingness to learn new systems.  Meets Expectation Example: Anne is a self-starter and is often willing learn new systems.  Needs Improvement Example: Anne is not a self-starter and is not willing learn new systems.  Comments |
| 1. Represent School of Aeronautics in workgroups and committees  * Exceeds Expectation Example: Anne has developed a strong relationship with our campus counterparts, as noted above. Is consistently viewed during the year as an “exceptional performer” and/or leader by co-workers, customers, and supervisors. She has been a dedicated presence for School of Aeronautics in the campus Budget meetings.   Meets Expectation Example: Anne does get along well with our campus counterparts, as noted above. She has been a dedicated presence for School of Aeronautics in the campus Budget meetings.  Needs Improvement Example: This goal has not been met. Anne needs to give more attention to working with her peers on campus. |
| 1. Professional Development - Learn a new skill or ability and demonstrate on the job.   Exceeds Expectation Example: Anne is tech savvy and independently developing solutions for some of the antiquated systems. She has helped the School of Aeronautics develop new ways to use CalPlanning, BAIRS and BFS. She is also learning to use Tableau. Attendance at an outside training course will be beneficial to Anne and I will support this expenditure.  Meets Expectation Example: Anne is tech savvy and frustrated with some of the antiquated systems. She is helping the School of Aeronautics develop new ways to use CalPlanning, BAIRS and BFS.  She is also learning to use Tableau. Attendance at an outside training course will be beneficial to Anne and I will support this expenditure.  Needs Improvement Example: Anne is frustrated with some of the antiquated systems and has taken an interest in learning how to use CalPlanning, BAIRS and BFS. This will be an important goal for her to focus on in the coming year. |
| Supervisor Initials:       Date: Click here to enter a date. Employee Initials:       Date: Click here to enter a date. |
|  |

**C. Which Operating Principle did this year’s performance best support?**



**D. Comments on Overall Performance:** (Brief description of what this job does. Opportunities for growth and development; recognition received; support of Operating Principles)  
Click here to enter text.

Exceeds Expectation Example:

Meets Expectation Example: Anne is definitely an above-average employee. With focus on areas needing improvement, performance could be at the highest level in all areas.

Needs Improvement Example: Anne has not met expectations for the goals we have discussed this year. I will work with her next year to ensure she is making progress on reaching these goals.

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| **E. Signatures:**  **Employee:**  My signature indicates I have received a copy of this review. *You may attach a response.*  Name:  Signature:       Date: Click here to enter a date.  ☐ Employee is unavailable for signature or refused to sign | **Supervisor:**  Name:  Title:  Signature:  Date: Click here to enter a date.  Next Level Supervisor (if required):  Title:  Signature:  Date: Click here to enter a date. |

***------ Next period’s section B -----***

**B. Top 3-5 Goals & Expectations *for next period***

1. Goals

2. Goals

3. Goals

4. Goals

5. Goals