



## PERFORMANCE REVIEW

### Employee Identification

<b>Name:</b>	David Kent	<b>Manager:</b>	C0000
<b>Position:</b>	Project Manager, Website	<b>Department:</b>	IS

**Evaluation Date:** 03/18/2009

**Review Period:** **From:** 04/01/2008 **To:** 03/31/2009

**Review Type:** Annual

### Review of Goals and Accountabilities

The following is a review of performance based on the major accountabilities and the goals established for this review period. The goals identified here should be those goals set at the last review. If this is your first review, then from the understanding of the job requirements identify those main goals and rate your performance.

<b>4/4</b> <b>Exceeds Expectations</b>	Performance consistently exceeds the expectations of the position and contributions are well beyond the normal job requirements. For example, achieves results which consistently exceed most planned goals and/or attained a significant value-added achievement(s) with measurable result(s); demonstrates an in-depth understanding of learned skills; has above average knowledge of required duties; individual planned goals have a positive and/or significant impact on the success of the department; performance is characterized by above average quality and quantity of work, self direction and self motivation; extremely efficient work processes and the ability to rapidly adapt to change.
<b>3/4</b> <b>Fully meets Expectations</b>	Performance is solid, effective and consistently meets the performance expectations required and defined by the role. For example, achieves results which meet or occasionally exceed planned goals; demonstrates satisfactory understanding of learned skills; has solid understanding of required duties; individual planned goals benefit the team/group; performance is characterized by satisfactory quality and quantity of work, self direction and initiative; normal work efficiency and routine ability to adapt to change.
<b>2/4</b> <b>Partially meets Expectations</b>	Performance is occasionally below expectations for reasons of lack of experience and/or development. Further training or development plan required to enhance basic skill(s) and / or knowledge. For example, achieves results that occasionally fail to meet job requirements and goals; learning or developing skills and / or knowledge for position.
<b>1/4</b> <b>Does Not Meet Expectations</b>	Performance consistently below the expectations of the position as defined for reasons within individual control. In consultation with people services a progressive performance management plan needs to be established. For example, achieves less than expected results; fails to remedy deficiencies in required skills and knowledge; performance is characterized by minimal quality and quantity of work, lack of self direction and initiative; inefficient work processes and / or inability to deal with change.

### Goals

**Employee Score:** 3.3

**Manager Score:** 3.2 / 4.0

**Score**

**Self:** Title: {Revitalization Project} Project Plan

Project plan &amp; sign-off

3.5 / 4.0

- Presented to PSC Jan. 13 (required updates to budget, milestones, add contingency & develop strategy for hybrid site model)
- Updated and emailed to PSC for review Jan 20
- Requested sign-off for Jan 23

**Title:** {Revitalization Project} Project Plan

JL: PM Plan was scheduled for early January, and David delivered on time. However, there were changes made to the Plan that caused an additional effort and time to obtain final sign-off. Although this is not considered to be exceeding expectations, David fully met management expectations.

3.0 / 4.0

**Self:** **Title:** {Revitalization Project} Frog Engagement  
Design engagement S.O.W. signed off

3.0 / 4.0

**Title:** {Revitalization Project} Frog Engagement

JL: David has worked very hard to ensure quality work from the Consultants. He has met my expectations.

3.0 / 4.0

**Self:** **Title:** {Revitalization Project} Monitor & control  
Monitor & control project spending according to plan & within tolerance (5%)

3.5 / 4.0

**Title:** {Revitalization Project} Monitor & control

JL: Due to time constraints and the aggressive schedules (all activities on critical path), I agree that David had put in an extra mile of effort to keep the whole project under control.

3.5 / 4.0

**Self:** **Title:** {Revitalization Project} Charter  
Charter developed & signed off

3.0 / 4.0

**Title:** {Revitalization Project} Charter

JL: The Charter was developed & signed off, fully meeting expectations.

3.0 / 4.0

**Self:** **Title:** {Revitalization Project} RFP  
RFP issued & proposal evaluated and vendors selected & need date

3.5 / 4.0

**Title:** {Revitalization Project} RFP

JL: Due to the aggressive schedule, it was not an easy task to ensure the RFP contained all the key essentials for evaluation and vendor selection within a very short time-frame. David had to push very hard to engage Frog, and he successfully managed to get them started on time.

3.5 / 4.0

## II. Performance Review

When completing the comments below the objective is to be as specific and detailed as possible to demonstrate the accomplishments during the review period.

### Performance Summary

**Employee Score: 4.0 Manager Score: 3.5 / 4.0**

Rating EE - Exceeds Expectations; FM - Fully Meets Expectations; PM - Partially Meets Expectations; NM - Does Not Meet Expectations.

Competency	Summary:	Rating			
		EE	FM	PM	NM
This is a summary of overall performance. Although some of the comments that might be included below appear to be repetitive from the prior section, this section attempts to pull all aspects of the performance together. Ensure to include any key accomplishments, strengths and areas for improvements.	<p><b>Self:</b> - Filled in as temporary team lead in conjunction with Robert Hempstock to assist in providing direction to development team while they were without a team lead</p> <ul style="list-style-type: none"> <li>- Managed and directed SMART eBusiness Program</li> <li>- SMART Exchange (Iterative approach</li> <li>- planned Iterations delivered on time "most ahead of schedule")</li> <li>- LMS</li> <li>- SME (IS contact for business unit )</li> <li>- WSSO Project</li> <li>- Initiation</li> <li>- Vendor selection</li> <li>- Vendor engagement</li> <li>- Revitalization Project</li> </ul>				

<ul style="list-style-type: none"> <li>- Training of web development team completed</li> <li>- Charter completed &amp; approved</li> <li>- RFI completed</li> <li>- RFP completed</li> <li>- Frog design engaged</li> <li>- NLC engaged</li> <li>- Project Plan completed &amp; approved</li> <li>- Web SAC</li> <li>- developed and manage IS Web Sac</li> </ul> <p>Smart exchange re-platform</p> <ul style="list-style-type: none"> <li>- Business case &amp; Charter</li> </ul> <p>Professional development</p> <ul style="list-style-type: none"> <li>- Completed 3 month PMP prep course</li> <li>- Completed 4 month PMI SAC mentorship program</li> <li>- Attended PMI conference</li> <li>- Attended various PMI sanctioned professional development sessions</li> </ul> <p>JL: David's overall project is complex in scope and has no buffer for delays. Just by keeping the project under control requires extreme competency and due diligence to ensure quality and alignment to corporate objectives, some of which were very difficult to define. David has exceeded expectations.</p>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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## Quality of Work

**Employee Score: 3.0 Manager Score: 3.5 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Extent to which work produced meets quality standards of accuracy, thoroughness and effectiveness	<p><b>Self:</b> - Demonstrates effective written and verbal communication skills</p> <ul style="list-style-type: none"> <li>- Is highly conscientious about the quality of work</li> <li>- Work demonstrates conscientiousness</li> <li>- Pays attention to details</li> </ul> <p>JL: David exceeds expectations in the sense that he goes the extra mile to find out the level of standards expected in terms of quality and outcomes of major deliverables. He seeks advice from Mike (from mgmt perspective), and John (from PMO perspective) to make sure he complies.</p>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Quantity of Work

**Employee Score: 4.0 Manager Score: 4.0 / 4.0**

Rating EE - Exceeds Expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Volume and timeliness of work based on the requirements of the job.	<p><b>Self:</b> - Exceeds expectations</p> <ul style="list-style-type: none"> <li>- Manages time well</li> <li>- Works well under pressure</li> <li>- Actively takes on all tasks and projects presented</li> </ul> <p>JL: David can juggle many tasks, but more importantly, he can deliver quality work within expected timelines. Additional PM research and continuous improvement tasks were undertaken by David (sometimes even voluntarily), and he constantly put in extra efforts in evenings and weekends to get them done, in order to help to improve things all around. Well done, David!</p>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Commitment

**Employee Score: 4.0 Manager Score: 4.0 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectation; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Extent to which employee can be counted on to carry out instructions and fulfill a variety of responsibilities with interest and enthusiasm.	<p><b>Self:</b> - Goes above and beyond the call of duty</p> <ul style="list-style-type: none"> <li>- Seeks out responsibility and follows through</li> <li>- Maintains a positive attitude when under stress</li> </ul> <p>JL: David can be counted on all the time, even under tight timelines. But more importantly, his attitude is beyond expectations. He takes criticisms very constructively, and he actually follows through to improve himself in so many ways. Please keep it up, David!</p>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Initiative and/or Creativity

**Employee Score: 4.0 Manager Score: 3.5 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Employee's Comments:	Rating			
		EE	FM	PM	NM
Extent to which employee is a self starter in attaining objective of job and taking on new opportunities. Extent to which employee	<p><b>Self:</b> - Contributes frequently in meetings and impromptu gatherings</p> <ul style="list-style-type: none"> <li>- Takes an active part in discussions</li> <li>- Works well independently</li> </ul>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

generates new ideas or concepts and identifies improvement opportunities.

- Accepts responsibility eagerly
- Adapts to change well

JL: David takes the initiative to improve, sometimes even offering to help others. David works closely with myself to find ways to improve continuously.

<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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## Judgment

**Employee Score: 3.0 Manager Score: 3.0 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Extent to which decisions and actions are based on sound reasoning, weighing of the outcome and supporting department and organizational goals.	<p><b>Self:</b></p> <ul style="list-style-type: none"> <li>- Follows directions well</li> <li>- Accepts responsibility willingly</li> <li>- Shows great flexibility</li> <li>- Shares information clearly and concisely</li> <li>- Isn't afraid to ask questions</li> </ul> <p>JL: David follows through very well with directions given to him. However, with the fast-growing organization like SMART, David is smart enough not to make hasty decisions without consensus and collects from different perspectives.</p>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Relationship Building

**Employee Score: 3.0 Manager Score: 3.0 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Extent to which employee cooperates with, and/or effectively influences people both inside and outside the company	<p><b>Self:</b></p> <ul style="list-style-type: none"> <li>- Has a pleasant personality</li> <li>- Is highly professional and presents well to clients/customers</li> <li>- Demonstrates a sense of humor</li> <li>- Gets along well with colleagues</li> <li>- Demonstrates a strong team playing ability</li> <li>- Demonstrates a high level of self confidence</li> <li>- Demonstrates a high level of self esteem</li> <li>- Is an active listener</li> </ul> <p>JL: I believe David has great relationship building skills. He is also a great team player. However, due to his major project where demands are quite aggressive, it has been difficult in some cases for David to spend more time to work out discrepancies with certain business lead when the opinions differ. This will take time to gel.</p>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Shared Values

**Employee Score: 3.0 Manager Score: 3.0 / 4.0**

Rating EE - Exceeds expectations; FM - Fully meets expectations; PM - Partially meets expectations; NM - Does not meet expectations.

Competency	Comments:	Rating			
		EE	FM	PM	NM
Demonstrates commitment to company goals, policies, the Code of Conduct and the team. Models behavior in accordance with SMART's values	<p><b>Self:</b></p> <ul style="list-style-type: none"> <li>- Takes criticism well and learns from mistakes</li> <li>- Constantly seeks professional development opportunities</li> <li>- Is someone that can be depended on</li> <li>- Is a good corporate citizen</li> <li>- Mature and responsible</li> </ul> <p>JL: David seeks ways to align with corporate goals and values all the time.</p>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Learning and Development FY 09

**Demonstrates commitment to professional growth through variety of available training opportunities.**

**Self:**

- completed PMP exam prep course (3 months)
- completed 5 month PMI mentorship program
- continued to be involved with PMI and associated educational opportunities

**Observable application of learning is demonstrated through use of knowledge and skills**

JL: David is pursuing all the key elements to becoming a true PM professional.

## FY10 Development Plan

**Self:**      **Title:**      Complete PMP exam

**Title:** Complete PMP exam

**Due:**

JL: Recommend getting certified this year while the PMP prep course training is still fresh.

**Self:**      **Title:**      Continue to be involved with PMI and associated educational opportunities

**Title:** Continue to be involved with PMI and associated educational opportunities

**Due:**

JL: Recommend to focus on Professional Development seminars, especially the ones related to helping David manage Programs and tight timelines.

## Final Comments

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