

**Carnivores Are Us**  
**Performance Review Report**

**Position: Development Associate**

**Incumbent: Dawne H.**

**Review date: April 25, 2015**

**Review period: April 1, 2014-March 31, 2015**

**Primary tasks and areas of responsibility** (from job description)

- Assist Development Director in all phases of program implementation
- Manage organizational membership
- Track up to ten grant applications or reports
- Maintain fundraising area of website
- Organize and manage donor and volunteer events
- Maintain records for major donor program

*Employee self-assessment*

I feel that I have done a good job of moving into all of these areas during the past year. I have been a stalwart assistant to our Development Director in all things fundraising. My biggest contribution has been in keeping track of our membership database. It was a mess when I got here and now it is functional and up to date.

*Supervisor comments*

Yes, I would agree that you have done an amazing job with the database. Also with the major donor records. You have helped me do a much better job of advancing our major gifts campaign as a result.

You've been able to integrate well into the team, and I look forward to your continuing to grow into the job.

*Overall rating on tasks and areas of responsibility*

1    2    3    4    5    6    7

**Results and outputs expected of this role** (from work plan)

- Membership records are current
- Outreach is accomplished according to annual calendar
- Major donor tracking systems are up to date
- Fundraising events are produced professionally
- Information on website is current

*Employee self-assessment*

There was a lot I was expected to do this year, and frankly I have not been able to accomplish everything. Membership is indeed current now, and our major donor info is up to date as well.

I'm not satisfied with my performance on our calendar and website. These projects were more complex than I realized but I'm going to continue to work on them this year.

The biggest flaw of the year was the fundraiser, but I feel that I learned a lot of lessons from it and know that this year's will go better.

*Supervisor comments*

As I look back at this list of outputs we set for you last year, I realize that some were quite ambitious and probably unrealistic as a result. I'm very pleased with your overall results despite your not getting to the website as much as we had hoped.

I was also disappointed that our fall fundraiser fell short of expectations. As we talked about before, this year I'd like to see you start earlier, be better organized, use volunteers more thoughtfully and otherwise better manage your time and the event.

*Overall rating on results and output*

1    2    3    4    5    6    7

**Behaviors expected for success in this position** (from job description)

- Timely and professional in all interactions
- Treats others with dignity and respect
- Takes leadership and initiative
- Holds sensitive information in confidence
- Maintains a sense of humor no matter what!

*Employee self-assessment*

I think that I have achieved a high level on these core values. I'm rarely late, and have received no feedback on how I treat others. I also feel that I have demonstrated leadership when asked, and maintaining a sense of humor is no problem.

*Supervisor comments*

Dawne, you have indeed become a good example for the rest of us on how to be a great team player. I would point to your participation in the company retreat as an example of taking initiative and guiding us to a great event.

As we talked about in your quarterly review, however, I've noticed that in some team meetings you can be overly assertive about your ideas, leading others to be

unable to make their point and contribution. Since we talked about this, I have seen you be more mindful of your effect on others, and it looks like you're going in the right direction with this. Thanks.

*Overall rating on behaviors*

1      2      3      4      5      6      7

**Plans for coming review period**

*Employee plans*

I am really enjoying my job here and have a lot of enthusiasm for the coming year. My big goals this year are to:

- Update our website
- Introduce an update to our donor software
- Produce an excellent donor event in the fall
- Continue to support our development efforts to better position us in making a real difference.

*Supervisor comments*

These goals are a good place to start. I'd like to see you move into the budget process as well, helping us better track and forecast our revenues.

We'll talk about the specifics of these tasks when we review your first quarterly work plan.

**Professional development plan for coming year**

*Employee self-assessment and request*

I need help in some areas to make me better at what I do. Specifically, I'd like to take an advanced class to help me better manage our database, and also get some training in leadership.

*Supervisor comments*

I support you in these requests. We'll have to see how the budget for training shapes up when we complete the budget.

Another class you might consider is one in public speaking. This is something many of us have done and I think it will help your confidence when working on our donor events.

**Employee feedback to supervisor**

*Employee comments*

You've been very helpful to me as I got started here, but it's been harder to get your attention in the past few months. I also find that sometimes the feedback you give me is hard to implement. Could you be more specific in what you'd like me to do differently?

**Supervisor’s overall assessment**

*Key accomplishments during the review period*

Dawne, you’ve been a real contributor to our program and we hope you feel empowered and recognized. Your ability to finally get our database cleaned up is greatly appreciated.

You have also done a great job with our major donor program, tracking names, setting appointments and doing research that has helped us exceed our revenue projections for this important area.

Most of all, I notice many ways in which you have become an integral member of our team. I see many staff noticing your contributions and I know they want to see more of what you can do.

*Employee strengths*

- Well organized
- Outspoken in bringing in new ideas
- Excellent at managing software projects
- Fun to work with

*Areas of improvement*

- Set priorities better
- Watch out for perfectionism
- Improve technical skills beyond the database
- Pay more attention to listening to others

*Summary performance rating*

1    2    3    4    5    6    7

**Final comments**

*Employee*

It’s been a great year for me and I’m looking forward to more!

*Supervisor*

Let’s make it an even more productive year, Dawne!

**Signatures**

\_\_\_\_\_  
Employee  
Date

\_\_\_\_\_  
Supervisor  
Date