

INDIVIDUAL DEVELOPMENT PLAN (IDP)
Classified Employees

Name <u>Employee C</u>	Classification <u>Accountant</u>	Review Year: <u>2006</u>
Department/Unit <u>Department C</u>	Supervisor <u>Supervisor C</u>	

Instructions – Complete IDP & attach to IDP checklist. (See IDP checklist for additional documents that may be required)

PLANNING SESSION:

NOTE - The planning session will establish the timelines in which to accomplish the established employee career goals and supervisor position expectations throughout the next year.

Department/Unit Goals (to be filled in by supervisor)

Migrate to new financial system
Redistribute work load appropriately within the Dept.
Update policies and procedures
Update web page

Employee Career Goals (to be filled out during discussion)

Attend professional development opportunities
Review Accountant series progression to explore requirements needed to advance
Explore CPA certification

Supervisor Position Expectations for next review year (to be filled out during discussion)

Assist with migration to new financial system
Review training manuals to assist with making them UW-L specific
Practice financial system to prepare for "go live"
Reconcile funding areas assigned to position
Update/create procedures manual for position

OUTCOMES (RESULTS) FOR REVIEW YEAR

Employee Career Goals

Outcomes (Results):

Was able to attend three professional development opportunities
Have not explored progression or CPA at this time

Comments:

Revisit progression and CPA within the next year

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Supervisor Position Expectations

Outcomes (Results):

Employee C has been an integral part of conversion to new system. Previous experience with software and ability to learn quickly and analyze data has been asset to project. Employee C consistently practices with the software to get ready for "go-live". Testing experience has allowed time to assist co-workers with testing. Reconciled funds appropriately. Reviews policies and procedures to gain complete understanding which allows for application of knowledge in various situations.

Comments:

Employee C is an asset to the accounting team. The years of experience and knowledge have helped the unit. Employee C is always willing to help co-workers.

Job Skills:

Rating Scale: Employee is to be rated using the criteria below. Please place an 'X' in the appropriate rating box.

U = Unsatisfactory - Performance is substandard and requires improvement.

M= Meets expectations - Performance fully meets and occasionally exceeds standards.

E = Exceeds expectations - Performance consistently exceeds set standards.

N/A (Not applicable) - Lack of sufficient knowledge to evaluate the performance factor.

NOTE: Please attach an additional sheet documenting reasons for any 'U' Unsatisfactory ratings.

Job Skills	U	M	E	N/A
Job knowledge: degree to which the employee knows and understands his/her job and its functions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quality of work: accuracy, presentability, neatness, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Productivity/Timeliness: manages a fair work load; takes on additional responsibilities as needed; manages priorities and time; handles information flow	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dependability: punctuality, regular attendance, overall reliability	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work habits: ability to plan and organize work; makes efficient use of time; follows through on work assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Organizational Skills: ability to establish goals/objectives, prioritize, anticipate problems, implement plans	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resourcefulness: adaptability, versatility, initiative, ease of learning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Problem solving: anticipates, identifies and prevents problems; defines problems, overcomes obstacles; generates alternative solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Professionalism: Displays a professional attitude and represents the campus well; treats co-workers, supervisors, students, customers, etc. with respect.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication Skills: ability to organize thoughts and present them clearly and concisely (written or orally)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

We have met and reviewed the outcomes (results) from the previous review year and have discussed and planned for the next review year.

Employee Signature/Date

Supervisor Signature/Date

(Signature does not necessarily indicate agreement of IDP results but simply that the items were reviewed)