A blue rectangle with white dots

Description automatically generated

**Summary of Accomplishments**

# Employee's Name:       Title:

**Department:** **Supervisor Name:**

**Period Covered From:** **To:**

**Instructions**

The Summary of Accomplishments (SOA) is a narrative description of your accomplishments as it relates to your job responsibilities, competencies, goals, objectives, and other factors. The SOA invites you to be part of a discussion about your performance over the past year. Your supervisor will review and consider your feedback prior to finalizing the appraisal form.

Please keep the following in mind while writing your SOA:

SPECIFICS MATTER: Use specific examples. Specific examples add credibility. Although words like outstanding, dependable, and create are positive, they do not always paint a convincing picture. Instead of stating you "always maintain good customer relations," cite customer satisfaction surveys, letters of commendation, and the absence of any customer complaints about you.

DATA-DRIVEN METRICS: Use numbers or metrics, if appropriate. Numbers are concrete. If you are in charge of a large staff, budget, or region, use numbers to show how large it is.

ACCURACY: Do not exaggerate. Your SOA should make you feel proud and help you speak confidently in a performance discussion. Exaggerations or misstatements will not give you confidence.

STAY ON POINT: Give relevant information. Align your feedback to specific core competencies, e.g. communication. Be sure the examples match the category; otherwise, they lose power.

PRECISION: Be factual, specific, and concise. The SOA does not need to be lengthy. Focus your language and convey your facts by highlighting key areas for the year in review.

QUANTIFY/EXPLAIN VALUE: Be sure to tie results to organizational goals. For example, as the new ethics coordinator at your organization, you may have conducted 40 ethics briefings in your first three months. The number sounds impressive, but what does it mean? Is there a correlation between your briefings and a reduction in violations or incidents? Whenever possible, translate your hard work into results your reader will value. Consider “negative data” to illustrate your effectiveness‐ information such as the absence of on‐the‐job violations, lawsuits, and grievances.

**Major Contributions and Accomplishments**

In the space below, please discuss the major contributions and accomplishments you achieved in the past year-in-review. Cite goals achieved, professional development initiatives achieved, and other accomplishments/contributions to your department.

**Major Challenges, Obstacles, and Unanticipated Developments**

Overcoming challenges is an important component of your overall performance. Doing so demonstrates innovation, creativity, and perseverance. Challenges may be technical or interpersonal in nature. They may also involve the ability to succeed despite limited resources or difficult circumstances. Note the challenges you faced and how you responded to those challenges.

**Core Competencies**

When applying the core competencies to your job responsibilities, pick one or two core competencies where you feel you are either particularly strong or have demonstrated improvement in the past year. Pick one or two core competencies where you feel you can enhance your performance with mentoring or professional development. For each example, please explain.

As a reference, please refer to [UCM's Core Competencies](http://hr.ucmerced.edu/employeelabor-relations/performance-management/core-competencies).

**Future Goals / Additional Comments**

Prior to meeting with your supervisor, please think about potential goals for the next review cycle. Your supervisor will consider your feedback, identify, and incorporate final goals on the appraisal form.

In the space below, please provide any additional comments. Perhaps you would like to further discuss career planning, professional development, or other areas. For example: Looking ahead at the next year and looking ahead at the next five years, what functions could you assume or where could you grow professionally to assist your department in pursuit of its deliverables?