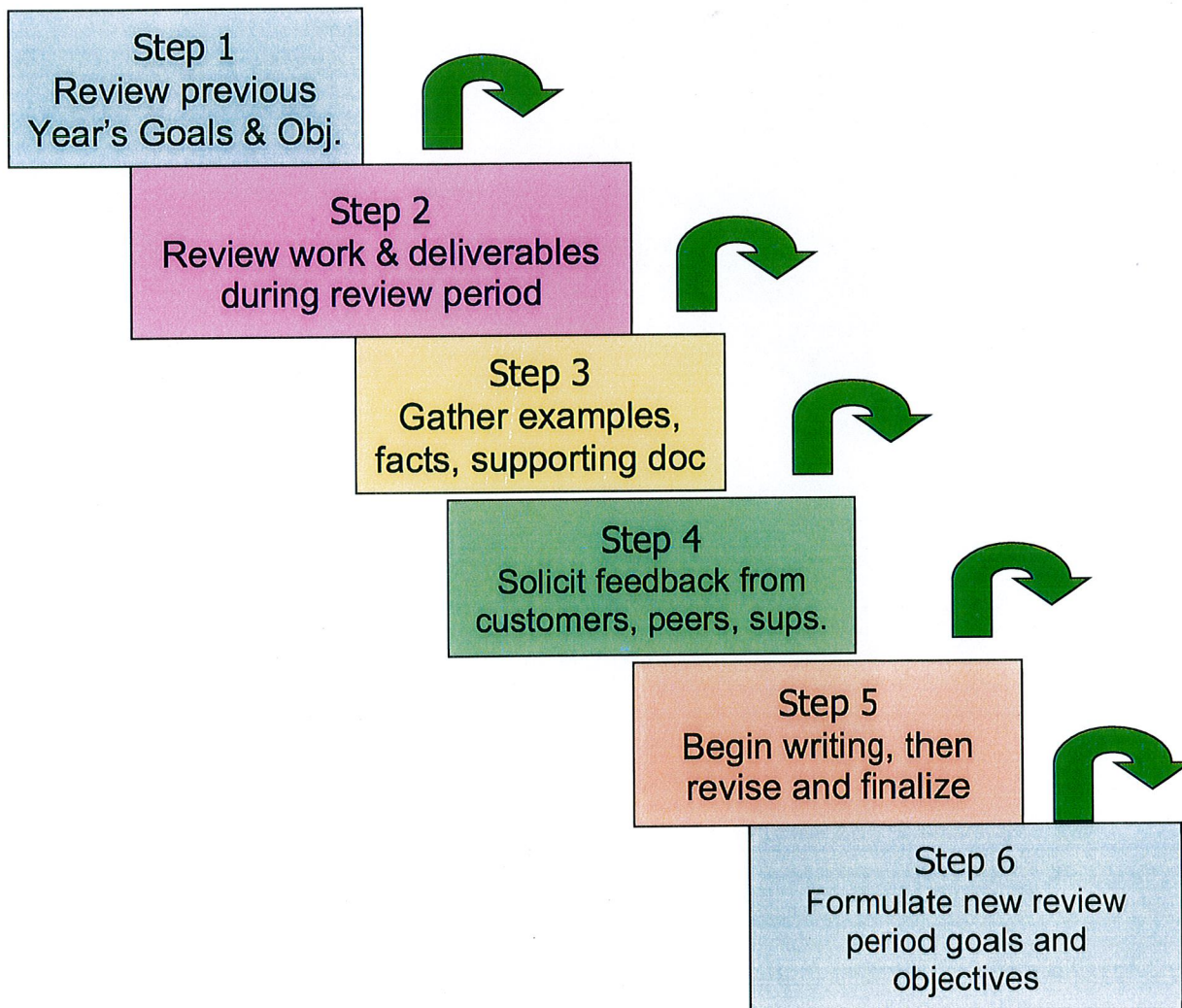


Writing Effective Employee Self-Assessments





Self Assessments--10 Key Dos and Don'ts

1. **Don't be modest.** Don't be shy about letting your supervisor know where you shone during the review period. Highlight your accomplishments with grace and diplomacy and, naturally, without putting any of your colleagues down. Be honest about your performance. Take credit for your accomplishments and take responsibility for any areas where you fell short.
2. **Don't forget about achievements made early on in the performance review period.** Your supervisor cannot possibly remember all of your projects and your participation. Go back over documents and emails to help you remember your earlier accomplishments.
3. **Don't be stuffy.** Writing in a conversational style will encourage your supervisor to talk with you about the elements in the self-assessment.
4. **Do get feedback from coworkers.** Consider asking your colleagues what they think of your performance.
5. **Do include objective measures of accomplishment.** The more you can highlight tangible benefits you offer the organization, the more invaluable you will appear. What difference did your efforts make to the division or team? What did you do to contribute to excellent customer service? How did your work further the organization's goals? Use dates, percentages, and numbers to back up your accomplishments.
6. **Don't use your self-assessment as a bargaining chip.** A review is not the time to bring up or argue about your compensation. Be clear about your accomplishments; save salary discussions for another time.
7. **Do use appropriate language.** Choose words that demonstrate objectivity and distance. For example, instead of saying how much you like your job, detail the ways that your job skills have improved during the review period.
8. **Do suggest areas with room for improvement.** If you can think of specific ways to improve your performance, mention them. Employers appreciate employees who have a realistic view of where they can improve.
9. **Do include task-related action plans.** Be as specific as possible about any ideas you have for improving your performance, learning new skills, or taking on new responsibilities.
10. **Do write more than one draft.** This self-review will become part of your permanent employment record, so be sure it's well crafted.

Self Assessments--Questions to ask yourself when developing your accomplishments:

1. The purpose of my organizational unit, department or team is:
2. The purpose of my job is:
3. The customers I serve are:
4. Some of my daily job responsibilities are:
 - Review previous year's goals and objectives.
 - What did you say you were going to accomplish the previous year? Did you do that?
 - How did you contribute to the organization?
 - How did you show initiative that you could be a key contributor/player?
 - What distinguished you from other employees?
 - What about your work sets you apart?
 - How did you do the job better than anyone else did?
 - What did you do to make each project your own?
 - What special things did you do to impress your supervisor/boss?
 - Did you win any awards?
 - Did you increase customer satisfaction?
 - Did your accomplishment achieve something for the first time?
 - Have you received any complimentary memos or letters from customers or other co-workers?
 - Do you have any tangible evidence of your accomplishments that you have produced or developed?
 - Did you contribute towards efficiency or productivity?
 - Did you improve a technical or procedural process?
 - Did you identify a problem and solve it?
 - What relationships did you build?
 - How did you expand your role?
 - How did you contribute to a return on investment (ROI)?
 - How did you help the organization fulfill its mission?
 - Have you show commitment to the department and organization? What new projects and assignments have you taken? What new training and skills have you acquired?
 - Any other ideas from the workshop?

Things not to do:

- Don't underestimate an entire year's worth of work, write something.
- Don't be too brief, but be specific and succinct about the accomplishment- No more than three to four sentences is enough in most cases.
- Don't produce a list of items already reflected in your position description.
- Don't list your position responsibilities, your manager should already know what your responsibilities are—use 3 to 5 key responsibilities instead.
- Don't blow your accomplishments out of proportion. Accomplishments should be measurable and verifiable. Never lie.
- Don't provide copies of testimonials from customers. Instead, summarize the comments you have received.
- Don't provide multiple attachments of feedback from customers, like emails; again, summarize.



Development and Career Interests

Development and Career Interests:

Describe short or long term goals for your development or changes to your assigned job duties that you would like your supervisor to consider. Include training, professional/career and other development activities that you believe are important.

What is a goal?

A goal is an agreed upon statement of what an employee will achieve in a specified period of time. A goal statement can be referred to also as an objective or a target you want to reach. The goal should also explain the resources necessary to achieve the goals and how you and your supervisor will measure success. Each goal should be specific, measurable, achievable, relevant and timely. Most importantly, goals should be somewhat challenging yet attainable; something the employee can accomplish but has to work at to accomplish.

Why do we write goals?

- Writing goals allows you to both measure and recognize achievement
- They also enable you to identify and focus on priorities

How do you write?

- You need to provide your thoughts and then finally talk to your supervisor about the upcoming year and discuss the feasibility of work assignments/goals.
- You may want to establish metrics at that point regarding volume, accuracy, time to produce, etc.
- Develop an action plan – focus on how the goals and objectives are to be achieved. This can measure your milestones, key steps or main efforts reached to achieve goal.
- Example: Covers period July 1, 2016 – to June 30, 2017

Goal/Objective: _____

Action Plan to achieve goal: _____

Measurement/Metric: _____

Measurement or metric can come from many different sources. This could be measured by quantifiable means; time, cost savings, etc. However, you can also measure your performance by receiving feedback from your internal and external customers. Customer feedback is a great way to measure customer satisfaction with the services you are working to deliver.

Finally, discuss measuring goals and what happens when the achievement is difficult to measure. Not all goals are easy to measure, when this is the case, work to develop some type of criteria for evaluating success.

Include – both short and long-term goals. A typical approach: write 2 to 3 short range; 1 to 2 long range and several ongoing year long goals. There are individual or team goals, special objectives or initiatives.

The following are performance plans that give you examples of goals and standards, along with their appropriate action plans and measurements. Keep in mind that these should be set **with** your supervisor/staff, not for them. It is a shared responsibility between employee and supervisor.

Example #1

Goal(s): Create and implement process improvements that reduce the current cycle time for month end closing activities with the general ledger from four days to three (25%) by July 1, 2017.

Action Plans:

1. By March 15, 2017, document current processes for handling month end closing activities and the average time for each process.
2. By April 2017, gather input from other staff in the department and draft a plan for streamlined process.
3. After reviewing streamlined plan with management, perform a test run of the process improvements for May's month end closing.
4. Evaluate the test results and make necessary modifications to handle June's month end closing.

Example #2

Goals/Standard: Prepare, edit and submit three papers to internationally recognized journals by June 30, 2017. On a consistent basis, demonstrate cooperation and support of your XYZ team members that shows reliable contributions and helps the team meet its scientific publication output goals for the year.

Action Plans:

1. On all publication assignments, complete your parts within the set deadlines without constructive feedback and input.
2. Pitch in and offer assistance to others on the team and respond in a timely way to their requests to meet expectations.
3. Set planning calendar milestones for team deliverables and edits based on submission dates and review. Review quarterly progress with group leader and team.
4. Maintain a positive, helpful and respectful manner in interactions with team members throughout process.
5. Address concerns that may arise directly with the source and constructively work out solutions in the process to get all publications submitted and accepted.

Career Development:

- Throughout the year, give some thought to where you want your career to go and what it will take to get there. This is a shared responsibility with employee and supervisor. What is it that you want? What additional knowledge, skills or abilities do you need? What interests do you have?
 - Continual participation in...
 - Expanded knowledge or skills in specific area, scope or function. . .
 - Formal or informal training in. . . .
 - Cross training or stretch assignment (project or initiative). . .
 - Collaborative support to do. . .
 - Ability to participate in projects/workgroups/initiatives in. . . .
- When you attend training, discuss what you learned with your supervisor and track your progress so that the results are apparent.

ACTION VERBS

Helping Skills	Management/Leadership Skills	Management/Leadership Skills Continued	Organizational Skills
Adapted Advocated Aided Answered Arranged Assessed Assisted Clarified Coached Collaborated Contributed Cooperated Counseled Demonstrated Diagnosed Educated Encouraged Ensured Expedited Facilitated Familiarized Furthered Guided Helped Insured Intervened Motivated Prevented Provided Referred Rehabilitated Represented Resolved Simplified Supplied Supported Volunteered	Administered Analyzed Appointed Approved Assigned Attained Authorized Chaired Considered Consolidated Contracted Controlled Converted Coordinated Decided Delegated Developed Directed Eliminated Emphasized Enforced Enhanced Established Executed Generated Handled Headed Hired Hosted Improved Incorporated Increased Initiated Inspected Instituted Led Managed Merged Motivated Navigated Organized Originated Overhauled Oversaw	Planned Presided Prioritized Produced Recommended Reorganized Replaced Restored Reviewed Scheduled Secured Selected Streamlined Strengthened Supervised Terminated	Approved Arranged Catalogued Categorized Charted Classified Coded Collected Compiled Corrected Corresponded Distributed Executed Filed Generated Incorporated Inspected Logged Maintained Monitored Obtained Operated Ordered Organized Prepared Processed Provided Purchased Recorded Registered Reserved Responded Reviewed Routed Scheduled Screened Submitted Supplied Standardized Systematized Updated Validated Verified

ACTION VERBS

Research Skills	Teaching Skills	Technical Skills	Administrative & Detail Skills
Analyzed	Adapted	Adapted	Approved
Clarified	Advised	Applied	Arranged
Collected	Clarified	Assembled	Catalogued
Compared	Coached	Built	Classified
Conducted	Communicated	Calculated	Collected
Critiqued	Conducted	Computed	Compiled
Detected	Coordinated	Conserved	Dispatched
Determined	Critiqued	Constructed	Executed
Diagnosed	Developed	Converted	Generated
Evaluated	Enabled	Debugged	Implemented
Examined	Encouraged	Designed	Inspected
Experimented	Evaluated	Determined	Monitored
Explored	Explained	Developed	Operated
Extracted	Facilitated	Engineered	Organized
Formulated	Focused	Fabricated	Prepared
Gathered	Guided	Fortified	Organized
Inspected	Individualized	Installed	Prepared
Interviewed	Informed	Maintained	Processed
Invented	Instilled	Operated	Purchased
Investigated	Instructed	Overhauled	Recorded
Located	Motivated	Printed	Retrieved
Measured	Persuaded	Programmed	Screened
Organized	Simulated	Rectified	Specified
Researched	Stimulated	Regulated	Systematized
Reviewed	Taught	Remodeled	Tabulated
Searched	Tested	Repaired	Validated
Solved	Trained	Replaced	
Summarized	Transmitted	Restored	
Surveyed	Tutored	Solved	
Systematized		Specialized	
Tested		Standardized	
		Studied	
		Upgraded	
		Utilized	