The Performance Review
Self-Appraisal
Despite knowing you and your job better than anyone, it can be difficult to summarize and objectively reflect on your work for a 12 month period.

**FOCUS ON ACCOMPLISHMENTS, LEARNINGS, CHALLENGES, & OPPORTUNITIES FOR GROWTH**
Why Self-Appraisals Are So Important

- They help to remind managers of your accomplishments, development and challenges during the review period.
- They can identify where there may be differences between your view and your manager’s view of your performance.

The self-appraisal is your chance to take control of your career by giving feedback on your current work situation and open up communication about goals, roadblocks and possible developmental training & resources for success.
### PAT Section 1: Major Responsibilities

**Responsibilities and Expected Results**
- Responsibilities and Expected Results should carry over from last year. If you didn’t have a review last year, you need to input these based on your job description.
- Write and/or review the expected results, and ensure you understand and agree with what success looks like for that responsibility.
  - If there are questions, make note to discuss this during your review conversation.
- Try and use examples, when possible, to give more depth to the discussion about your accomplishments and opportunities.

<table>
<thead>
<tr>
<th>Responsibility:</th>
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<tbody>
<tr>
<td>Pulled from job description</td>
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<table>
<thead>
<tr>
<th>Expected results:</th>
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<tbody>
<tr>
<td>What successful performance looks like</td>
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<table>
<thead>
<tr>
<th>Employee Self Assessment:</th>
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<tbody>
<tr>
<td>How you think you did - accomplishments, challenges, opportunities &amp; learnings</td>
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<table>
<thead>
<tr>
<th>Supervisor Assessment:</th>
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<tbody>
<tr>
<td>How your supervisor thinks you did</td>
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### STAR Method

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<tr>
<th>S</th>
<th>Situation</th>
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<td></td>
<td>Detail the background. Provide a context. Where? When?</td>
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<tr>
<th>T</th>
<th>Task</th>
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<td></td>
<td>Describe the challenge and expectations. What needed to be done? Why?</td>
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<th>A</th>
<th>Action</th>
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<td>Elaborate your specific action. What did you do? How? What tools did you use?</td>
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<th>R</th>
<th>Results</th>
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<td>Explain the results: accomplishments, recognition, savings, etc. Quantify.</td>
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Performance Ratings

- Unsatisfactory: performance is not meeting expectations
- Requires Improvement / Learning Role: performance does not fully meet all expectations. For new employees, this may be because they are still learning the role. (modified definition for 2017)
- Meets Expectations: fully competent in core job responsibilities & expectations, may occasionally produce work at a higher level
- Exceeds Expectations: consistently exceeds expectations in most aspects of the role
- Outstanding: top performance in the organization, elevates standards of performance to a new level, likely has an organization-wide impact with process improvement
PAT Section 2: Performance Categories

**Job Knowledge:**
Shows solid understanding of areas of responsibility and knowledge required to perform effectively in these areas.

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<tr>
<th>Employee Self Rating</th>
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<th>R</th>
<th>M</th>
<th>E</th>
<th>O</th>
<th>NA</th>
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**Employee Self Assessment of Job Knowledge:**

- Do I have the knowledge to carry out my all my job responsibilities?
- Have new knowledge requirements been introduced this year?
- Did I gain new knowledge this year, through education, or other development?
Performance Categories (cont.)

- Are there measures or techniques I use to assure quality of my work?
- Did I receive feedback from co-workers or managers on a specific project or product that I worked on this year?
• Was I able to manage my workload at a pace consistent with my manager’s expectations?
• Has the workload changed in the past year? Has this impacted my ability to produce at a certain level?
• Have I developed new techniques/methods to increase productivity?
Performance Categories (cont.)

- How is my skill with each of the electronic systems I use? (PeopleSoft, EPIC, Microsoft Office, etc.)
- How is my technical ability with physical equipment? (AV Systems, scientific or medical equipment, office equipment, etc.)
• Did I consistently meet deadlines, and communicate to my team if the timeline needs to be adjusted?
• Did I meet expected turnaround times? (job tasks, email responses, etc.)
• Was I present or available at all necessary meetings and events?
• Am I on time to work, or early? Does my team know when I will be out and who to contact in my absence?
Performance Categories (cont.)

- How well do I work with people with differing backgrounds and perspectives than my own?
- How effectively do I handle conflict?
- How well do I keep a positive attitude under pressure or during change?
- Do my interactions support a respectful and positive work environment?
- How well do I proactively anticipate the needs of my co-workers, customers, etc.?
Performance Appraisal Timeline

Jan 3 – Jan 24
- Employee completes Self-Appraisal
- Submit to Supervisor
- Returns if rework is suggested

Jan 25 – Feb 13
- Supervisor completes Appraisal
- Submit to HR
- Returns if rework is suggested

Feb 13 - Feb 24
- Employee & Supervisor Performance Conversations

Deadline: Feb 28
- Appraisal sent back to Employee for signature
- Appraisal is complete
Tips To Get Started on a Great Self-Appraisal

• Take your time
  – The appraisal is about you, and you’re worth it!
  – Use all of the categories available in the tool to tell your story
  – Set dedicated time on your calendar

• Give yourself a few scheduled sittings for completion
  – Give yourself time to reflect and build on your assessment over time
  – Use examples to support your assessment
  – Careful review shows your supervisor you take the process seriously

• Be honest & open about your achievements and challenges
Places to Look for Inspiration

• Use these as a starting point for examples of your work:
  – Calendar events of important meetings or planning sessions
  – Emails containing thanks and feedback
  – Historical “to-do” lists & notebooks
  – Completed project documents

• Reflect on the result in each situation, what went well, and where there might be opportunities for improvement

• Consider keeping a log of your work in 2017 to make writing next year’s review easier