

# Tips for Writing Your Annual Self-Assessment

## A Self-Paced Guide

### **Purpose of a Self-Assessment**

*A common question asked by employees is “why do we do self-reviews?”*

There are a number of reasons why they are valuable:

- It gives you the opportunity to highlight your accomplishments/performance for the last year.
- You can emphasize what you want your supervisor to consider as s/he reviews your performance (from your perspective).
- It serves as a checkpoint for the progress you’re making in your personal goals, and how that matches with your supervisor’s/department’s goals and objectives.
- It also serves as an opportunity to request specific feedback from your supervisor, to make requests, or give feedback to him/her.

### **Self-Assessment Content**

*Your Self-Assessment is a high-level summary of overall performance, not a detailed list of all work you did. Think of it as a formal recap of performance conversations you and your supervisor had since your last review. Limit your comments to the most essential and significant information to best help you and your supervisor assess overall performance. If you wrote formal goals and objectives, then assess your success towards meeting these commitments. Avoid writing achievements that are not of equal or greater impact than the goals and objectives accomplished.*

**Here is information you should gather:**

- Midyear review (if one was written)
- Goals and objectives for the year
- Weekly status notes from meetings with your team, supervisor, and key partners
- Specific feedback (both positive and negative) from others
- Written communication to your team, supervisor, key partners, etc.
- Forms of recognition, compliments from others (i.e., positive e-mails from others, awards, etc.)
- Your planner/calendar
- Monthly recap of accomplishments

### **Questions to Ask Yourself**

**On my performance:**

- What were my major accomplishments? What impact did I have?
- What made me successful?
- What goals and objectives were not achieved? Why?
- What could I change to improve my performance?

## On my development:

- In what ways have I grown or developed?
- What aspects of my job do I like best/least? Why?
- What areas of my job highlight my strengths; where are my opportunities?
- What have I done to promote my own professional development?

## Tips for Writing your Self-Assessment

### 1. Comments should be clear, concise and brief.

Like this:

*Internal and external customer service is a top priority as exemplified by my commitment to resolve customer issues immediately as shown by their feedback. Every time a customer has an issue I document the concern in our system to make sure anyone can assist the customer.*

Not like this:

*Our team goes the extra mile if we have a disappointed customer, and makes sure to get back to the customer and find a way to satisfy them so they are not disappointed in us. We consistently respond to daily customer requests right away, regardless of how complicated they are.*

### Action Verbs

achieved	defined	guided	perceived	selected
accelerated	delegated	increased	performed	set up
adapted	developed	influenced	persuaded	solved
adjusted	demonstrated	implemented	planned	stimulated
administered	designed	inspected	prepared	structured
analyzed	directed	instructed	presented	streamlined
applied	effected	interpreted	promoted	succeeded
approved	eliminated	improved	recognized	summarized
attained	encouraged	launched	recommended	supervised
chaired	enlisted	led	reduced	taught
communicated	established	lectured	related	tested
coordinated	estimated	maintained	reported	trained
conceived	expedited	managed	researched	transformed
compared	evaluated	molded	resulted in	translated
completed	expanded	motivated	revealed	traveled
controlled	forecast	negotiated	reviewed	tutored
counseled	founded	organized	revised	updated
created	generated	participated	scheduled	wrote

### 2. Focus on HOW results were achieved; do not merely restate your goals.

Like this: *My quarterly store visits and attendance at the merchant division meetings have created increased rapport with both the stores and the merchants.*

Not like this: *I have developed great relationships with the merchants and the stores.*

### 3. Give a balanced picture.

Discuss goals not accomplished and your plan to tackle them. Do not gloss over mistakes, take ownership.

4. **Be specific: avoid vagueness. Provide enough details so your leader's leader can understand your accomplishments. Use actionable/measurable words or phrases.**

Like this: *My implementation and personalization of the recruiting program led to a 20% increase in new hires as compared to last year.*

Not like this: *The recruiting program, along with my ideas had a great affect on hiring.*

5. **Be committed: avoid qualifiers.**

Like this: *I contributed to the 5% increase in student admissions by responding to prospective emails within four hours.*

Not like this: *Although the department did not make the student retention rate, we did increase student admission rate.*

6. **Pay attention to detail, check for accuracy and quality.**

Like this: *I identified five partnership opportunities within a six-week period that helped to achieve a 6% increase in student enrollment for the year.*

Not like this: *I identified five partnership opportunities within a six-week period that helped to achieve a 60% increase in student enrollment for the year.*

7. **Be aware of grammar, sentence structure and punctuation.**

Like this: *Mary and I partnered to report and present our inventory plan.*

Not like this: *In terms of partnership, she and I did a great job on putting together our inventory plan.*

8. **Include a specific development plan/action plan.**

Like this: *Before starting a new project, I will write a detailed plan that includes my responsibilities, project employee responsibilities, and specific timing for each action.*

Not like this: *I will use tools to be a better project planner.*

## Annual Performance Categories

### Performance Rating

### Description

Employee performs **beyond** normal work requirements.

Performance over a sustained period of time is clearly and consistently exceptional; continually exceeds all expectations of what is required or should be accomplished. Both results and how they are achieved are exceptional.

Work performance **meets** normal work requirements. The employee completes tasks as assigned.

Fully meets and sometimes exceeds position requirements. Demonstrates, full understanding of all required functions.

Work performance **needs improvement.** Employee is having performance problems.

Requirements and responsibilities of the position are usually handled competently. Sometimes meets the job expectations but consistently at this time.

**Unsatisfactory** work performance.

Does not meet job requirements. May be on the Positive Discipline Process.

- Ensure you fully understand each category definition and ask your supervisor to clarify any questions you may have.
- For employees **new in position** understand that it is almost impossible to be at peak performance. You do not know the entire organization, the key players, and your learning curve is still steep. It is not uncommon to receive a rating of Needs Improvement or Meets Normal Work Requirements for your first year-end review.

## **Guidelines Supervisors Use When Writing Reviews**

### **Considerations for Performance Rating**

In assessing performance, your supervisor is encouraged to look beyond objective results. They also consider other information, some are listed below:

- Actual performance relative to goals and objectives
- The specifics of the performance category definitions
- Input from key business partners
- Performance throughout the entire review period

### **Your Role During the Review Process**

- Complete the self-assessment form.
- Be open and positive to your leader's comments – do not get defensive.
- Ask for clarification if you are unclear about any feedback.

## **What Happens Next?**

After submitting the Self-Assessment, your supervisor will write your actual review and schedule time to deliver and discuss his/her feedback.

At your review meeting, here are some guidelines for what your role will be:

1. **Actively Listen** - Your primary role is to listen to your supervisor's feedback about your performance for the period being evaluated and learn from it.
2. **Summarize** – make sure you have a clear understanding of the feedback you are given and let your leader know you understand it.
3. **Respond** – let your supervisor know your thoughts about the feedback.
4. **Get Clarity** - If you are unclear on any feedback you have received, be sure to ask your supervisor for specific examples.

## **Notes**

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