



# Non-Union Staff Self Appraisal Workshop

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# WELCOME!

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## TODAY'S PRESENTERS:

Liliana Rojas – Director, Employee Relations & Professional Development

Mara Krasts – HR Project Manager

# AGENDA

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- **Workflow and Updates**
- **Preparing for Your Self-Appraisal**
- **Breaking it Down – Taking a Deeper Look at the New Template**
- **SMART Goal Method**
- **Thinking Ahead for Next Year**
- **Additional Resources**
- **Questions**



# Workflow and Updates

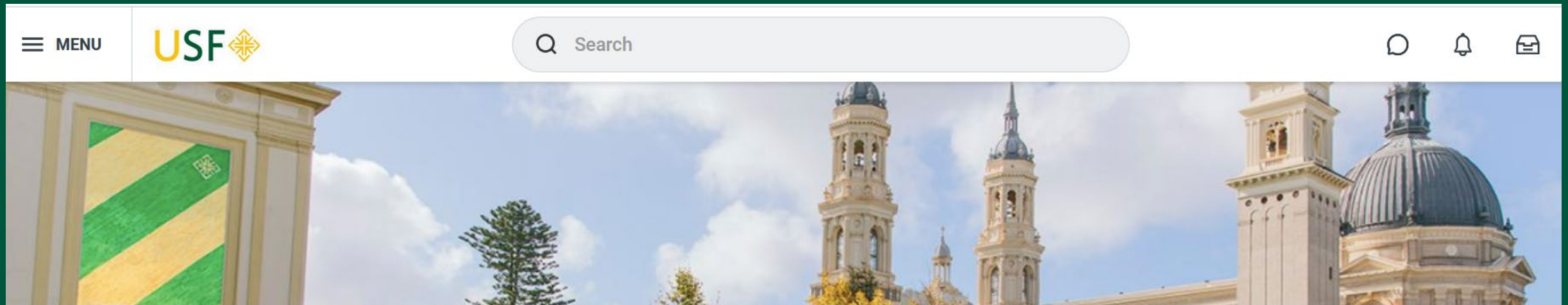
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# Process Updates

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- There are no changes to the appraisal template or ratings for 2023.
- The process will launch on Jan. 3, 2024, as previously communicated
- You will have until Jan. 17 to complete your self-appraisal
- **NEW:** You are able to attach supporting documentation to your self-appraisal.
- Once you complete and submit your appraisal, your manager will automatically receive a notification that they need to complete your review in Workday
- After your manager has completed your review and it has been approved, your manager will schedule a 1:1 with you.
- **IMPORTANT: The rating cannot be changed during the 1:1 and is final.**

# Sample Self-Appraisal in Workday



- PDF of the template is available on myUSF
- Content from a Word document can be copied and pasted into the Workday template
- You can attach supporting documents to your self-appraisal

# USF Non-Union Self-Appraisal Template

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**Part 1: Accomplishments** - Please enter 3-5 accomplishments from the previous appraisal period based on your 2023 goals and objectives. Please include at least one example of how the accomplishment supported USF's mission, vision, and values.

**Part 2: Professional Strengths** - Please identify 3 professional strengths.

**Part 3: Development** - Please identify 3 areas for further development.

**Part 4: Goals and Objectives** - Please enter 3 goals or objectives you would like to accomplish for the upcoming year. Please ensure that one of your goals or objectives supports USF's mission, vision and values.

# Overall Ratings

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- **Sets a new standard:** Consistently exceeds expectations and delivers beyond the goals of the role. Influences others to perform better.
- **Often exceeds expectations:** Regularly exceeds expectations. Requires little to no additional direction.
- **Consistently meets expectations:** Consistently meets expectations. Achieves a majority of the goals for the role.
- **Needs development:** Does not consistently meet expectations. One or more of the goals were not achieved. Additional direction and support are needed.





# Preparing for Your Self-Appraisal

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# Preparing for Your Self-Appraisal

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- Familiarize yourself with USF's Vision, Mission, and Values
- Review a copy of your 2022 appraisal
- Review your job description, core responsibilities, current projects
- Did you create a Pride Folder? Now is the time to use it!
- Review your completed training including online training; assess your needs and desires for additional training
- Talk with your manager!

# Self-Appraisal Considerations:

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- Where have you excelled?
- What achievements are you most proud of?
- What goals do you wish you could have accomplished?
- What would help you to accomplish these goals?
- What do you find challenging about your job?
- What career goals do you hope to accomplish in the next three years?
- What do you most like about your job?
- What else would you be interested in learning about?

# Self-Appraisal Phrases – Job Performance

- I take pride in my work and value doing my job well.
- I frequently volunteer to participate in projects that are beyond my job responsibilities.
- I promote a team-oriented work environment by [insert specific examples here].
- I have decreased [e.g., costs and employee turnover] by [insert specific number here]%.  
• I frequently challenge myself to perform better.
- I am happy to answer questions my peers have and often provide guidance on [insert specific examples here].

# Self-Appraisal Phrases – Reliability

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- I follow through on my commitments to others and keep them aware of any challenges I face.
- I have met [insert specific number here]% of my major deadlines.
- I use my time effectively and am able to prioritize my work.
- I am mindful of my team and customers' needs and schedule my planned time off well in advance.
- I am not afraid to ask for guidance when necessary.
- I promptly respond to emails I receive

# Self-Appraisal Phrases – Additional Development Needed

- I typically have a very positive mindset but struggle with difficult conversations that need to take place.
- Although I communicate clearly with small groups, I usually don't get my ideas across when I'm presenting information to a larger group.
- I have a tendency to stick with what's working and am not always open to new ideas or suggestions for change.



# Breaking it Down

- Accomplishments
- Professional Strengths
- Development
- Goals and Objectives

# Accomplishments

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- Projects you completed on time and in which your participation played a great role
- Projects to which you contributed more than was expected from you
- All additional tasks you undertook; how did you flex your role?
- Courses, trainings (online + in-person) and other learning opportunities
- Achieving goals and objectives



# Professional Strengths

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*A strength is "the ability to consistently provide near-perfect performance in a specific activity."*

–Gallup, "How Employees' Strengths Makes Your Company Stronger"



# Examples of Professional Strengths

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- Builds strong relationships / is empathic / seeks diverse perspectives / includes others in decision-making / is collaborative
- Shares information / helps others learn and develop / attends to own learning / puts learning to use / uses resources
- Embraces change / leads change / is adaptable
- Inspires others / shares vision
- Thinks critically / makes good decisions / supports reasonable risks / learns from mistakes / thinks strategically / effectively analyzes situations and data
- Communicates clearly / shares ideas and solutions / listens actively
- Is accountable / encourages accountability in others / is responsible

# Development

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- It's important to know your weaknesses at work: No one is perfect!
- Thinking about areas for improvement should be a positive, growth-oriented experience instead of a negative view of your current skillset.

## Common areas for improvement at work:

Policy & Procedure

Active Listening

Accepting Feedback

Written Communication

Delegation

Attention to Detail

Organization

Teamwork

Flexibility

Decision-making

Conflict Resolution

Leadership

# Goals and Objectives for 2024

A goal is an outcome you want to achieve; an objective is a specific and measurable action that can be reached in a short amount of time, related to a goal.

## GOALS:

- Setting goals can provide self-motivation and show your manager how you aim to improve in your position and contribute to your department.
- Common types of goals: Productivity, Skills, Training, and Achievement-Based goals
- SMART goals

## OBJECTIVES:

- Specific actions and measurable steps that you need to take to achieve a goal.
- Strong objectives are specific, measurable, achievable, realistic and time-bound.



# SMART Goal Method

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# SMART Goal Method

**Specific:** What will be accomplished? What actions will you take?

**Measurable:** What data will measure the goal? (How much? How many? How well?)

**Achievable:** Is the goal doable? Do you have the necessary skills and resources?

**Relevant:** How does the goal align with broader goals? Why is the result important?

**Time-Based:** What is the time frame for accomplishing the goal?



# Thinking Ahead to Next Year

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# Keep Notes Throughout the Year

- Maintain notes in real time. Take notes during your 1:1 meetings with your manager.
- Keep a folder with all related items for your self-assessment.
- Archive emails on a job well done in your self-assessment folder along with any other feedback you receive throughout the year.
- Use your calendar as a tool to track your accomplishments and projects.
- Do all this and your self-evaluations will be easy!






# ADDITIONAL RESOURCES


- [SMART Goals](#): USF Goal Setting Guidance
- [Give Yourself an Honest Performance Review](#): video, 3 minutes
- 10-8 appointments will be available starting Jan. 3, 2024 through the appointment calendar on your myUSF home page or on the HR home page

## CONTACT HUMAN RESOURCES

Lone Mountain Main  
Room 339  
Currently operating remotely

**Hours:** BY APPOINTMENT ONLY

 [\(415\) 422-6707](tel:(415)422-6707)

 [\(415\) 386-1074](tel:(415)386-1074)

 [humanresources@usfca.edu](mailto:humanresources@usfca.edu)

[SCHEDULE APPOINTMENT](#)



**THANK YOU!**

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# QUESTIONS?

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