Non-Union Staff Self Appraisal Workshop
WELCOME!

TODAY’S PRESENTERS:

Liliana Rojas – Director, Employee Relations & Professional Development
Mara Krasts – HR Project Manager
AGENDA

• 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
Process Updates

- 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
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

• **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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• 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:

- 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

- 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

• 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

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

• 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

• 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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- **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
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
THANK YOU!
QUESTIONS?