WELCOME!

TODAY’S PRESENTERS:
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AGENDA

• What’s New This Year
• Preparing for Your Self-Appraisal
• Breaking It Down - Taking a Deeper Look at the Appraisal Form
• SMART Goal Method
• Thinking Ahead for Next Year
• Additional Resources
• Questions
What’s New This Year
The entire appraisal process takes place within the Workday platform.

- There are **no changes** to the previous OPE self-appraisal template.
- The process will launch on March 6 with an email in your USFWorks inbox notifying you that you have a task to complete.
- You will have until March 24 to complete your self-appraisal.
- Once you complete and submit your self-appraisal, your manager will automatically receive a Workday notification that they need to complete your review.
- After your manager has completed your review and it has been approved, your manager will schedule a 1:1 with you.
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
Preparing for Your Self-Appraisal
Gather Your Tools

• Familiarize yourself with USF’s Vision, Mission, and Values Statement
• Review your job description, core responsibilities, current projects
• Did you create a Pride Folder? Now is the time to use it!
• Review a list of your completed training
• Assess your needs and desires for additional training
• Talk with your manager!
1. What were your major accomplishments during the past year; be as specific as possible:
2. List your job-related strengths; please give examples of how you utilized these strengths during the past year:
3. Identify any difficulties or problems encountered in the workplace and actions you took to overcome these difficulties or problems:
4. Identify any job-related weaknesses or areas where you believe additional development is needed:
5. What are your professional goals and objectives for the next year at USF:
6. What resources can be provided which would assist you in meeting future goals/objectives:
7. Are there any additional comments, observations or suggestions you care to make which would help your supervisor and the University evaluate your job performance?
Self-evaluation Considerations:

• Where have you excelled?
• What achievements are you most proud of?
• Where do you feel you need more support?
• What goals do you wish you could have accomplished?
• What would help you to accomplish these goals?

• What do you most like about your job?
• What do you most dislike about your job?
• What improvements could be made to make your role easier?
• What components of your job would you like to eliminate and why?
• What career goals do you hope to accomplish in the next three years?
Self-Evaluation 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 exceeded my [insert specific goal here] performance goal by [insert specific number here]%.
• I have decreased [e.g., costs and customer churn] by [insert specific number here]%.
• I frequently challenge myself to perform better.
Self-Evaluation 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 regularly show up on time and am fully prepared to start my day.
• I am not afraid to ask for guidance when necessary.
Self-Evaluation Phrases – Additional Development Needed

- Although I try to be transparent, I have recently become aware that my team doesn’t think I am.
- I typically have a very positive mindset and struggle with holding 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

• 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 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"
Professional Strengths: Examples

• 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:

- Confidence
- Active Listening
- Accepting Feedback
- Written Communication
- Delegation
- Attention to Detail
- Organization
- Teamwork
- Flexibility
- Decision-making
- Conflict Resolution
- Leadership
Goals and Objectives

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
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
Keep Notes Throughout the Year

• Maintain notes in real time. Take notes in your 1:1 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.
• Self-Evaluations won’t be so painful!
Resources

- **SMART Goals**: USF Goal Setting Guidance
- **Give Yourself an Honest Performance Review**: video, 3 minutes
- **USF WRITING CENTER**: Non-students can call to make an appointment for assistance. (415-422-6713)
- 10-8 appointments available through the appointment calendar on your myUSF home page or on the HR home page
THANK YOU!
QUESTIONS?