WELCOME!

TODAY'S PRESENTERS:

Liliana Rojas, Director, Employee Relations

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**

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What's New This Year

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Workflow and Updates

- There are **no changes** to the previous OPE self-appraisal template
- The process will launch on March 11 with an email in your USFWorks inbox
- You will have until March 22 to complete your self-appraisal
- **NEW:** You are able to attach supporting documentation to your self-appraisal.
- Once you complete your appraisal and Submit, your manager will automatically receive a 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.
- **IMPORTANT: The appraisal cannot be changed during the 1:1 and is final.**

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Sample Self-Appraisal in Workday
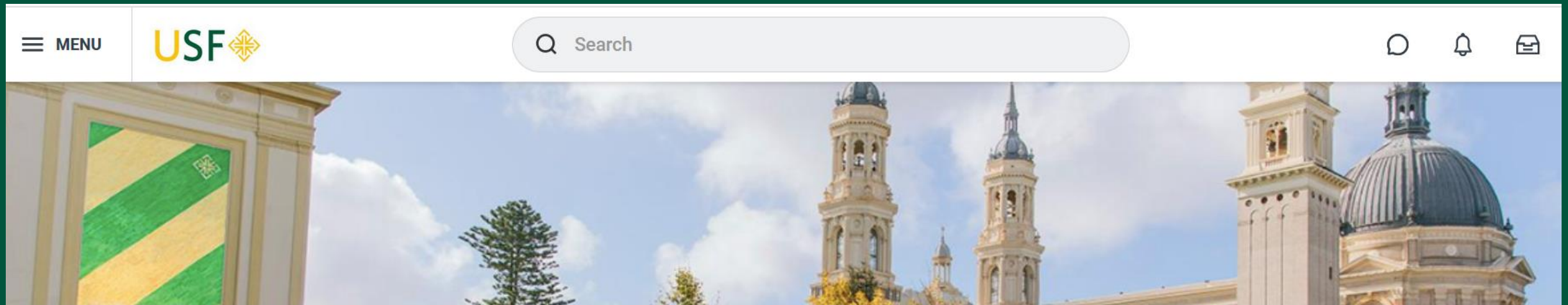
- PDF of the template is available on myUSF
- You can attach supporting documents to your self-appraisal

Preparing for your Self-Appraisal

- 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!

USF Self Evaluation Form

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 utilize 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?

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Self-evaluation 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?

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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.

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"

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:

Policy & Procedure	Organization
Active Listening	Teamwork
Accepting Feedback	Flexibility
Written Communication	Decision-making
Delegation	Conflict Resolution
Attention to Detail	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

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.

- 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!

Track Your Accomplishments

- Keep track of all your accomplishments throughout the year
- Not all accomplishments have corresponding data
- If data is available for tasks and/or projects collect it, collect it in real time
- Beneficial to obtain data throughout the year – will avoid a last minute scramble.
- Add these to your self-assessment folder.

Additional Resources

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Resources

- [SMART Goals](): USF Goal Setting Guidance
- [Give Yourself an Honest Performance Review](): video, 3 minutes
- 10-8 appointment link – Make an appointment with us for help with your self-appraisal. Starting March 11

THANK YOU!

QUESTIONS?