

Note: To prepare for a transition to the new Workday system later in 2018, some changes have been made to the performance templates in an effort to simplify the form and focus attention on performance goals for the coming year. The Development Plan and Competency sections have been removed. You may still use Competency information to inform writing of goals.

Conducting A Self-Evaluation



A self-evaluation is a great opportunity for employees to honestly and objectively consider and document their performance. Having said that, employees must also know how to complete a self-evaluation and be comfortable with the process. Properly conducting a self-evaluation can make the difference between a meaningful evaluation and one that is less effective. This brief tip sheet is meant to enable you to conduct better self-evaluations.

What Is A Self-Evaluation?

A self-evaluation is your thoughtful and considered written review of your performance during the evaluation cycle. It involves rating established goals, competencies, and overall performance.

What Are The Benefits of a Self-Evaluation?

When you self-assess, you become an active participant in your own evaluation. Your involvement enables you to honestly assess your strengths and also areas you need to improve. You then can participate more constructively in the evaluation meeting with your supervisor. Self-evaluation also serves to increase commitment to goal setting/achievement, competency development, and career planning.

What Do You Need To Do In Order to Complete Your Self-Evaluation?

Time. Allow about an hour to complete the self-evaluation. That hour includes time you may need to review documentation that you've kept throughout the year relating to your goals and competencies.

Quiet. Conduct the self-evaluation in a quiet place without interruptions so you can devote your full attention and reflection to the process.

Relax. Try to relax and reflect upon individual goals, experiences, and incidents. No one is perfect, and it is very likely that you will recall both good and bad experiences. The purpose of the evaluation process is to highlight strengths, correct performance weaknesses, and develop unused skills and abilities. In order to do this, you must be willing to recognize areas that need improvement or development.

Highlight the highlights. Don't be shy about letting your supervisor know where you shone during the year. The self-evaluation is the place to boast with grace and diplomacy and, naturally, without putting any of your colleagues down. Don't be modest; state your accomplishments objectively and accurately.

Don't forget about achievements made early on in the evaluation period. Your supervisor cannot possibly remember all of your projects and your participation throughout the year. Go back over documents and e-mails to help you remember your earlier accomplishments.

Don't be stuffy. One of the benefits of a self-evaluation is its tendency to lead to constructive dialogue between you and your supervisor. Therefore, try to write in a conversational style, one that is as natural as the verbal back-and-forth that occurs throughout the year.

Solicit feedback from coworkers. Consider asking your colleagues what they think of your performance. Be careful, of course, to avoid platitudes, overly critical comments, and any other remarks that could take away rather than enhance your self-evaluation.

Be objective. It's awfully tempting to give yourself high marks across the board, but it's a little unlikely that you've done everything right. Instead of evaluating yourself based on how you wished you'd performed, offer the results and quantify them as much as possible by using facts, figures, and specific dates. The more you can point to the tangible benefits you offer the University, the more invaluable you will be. Ask yourself some specific questions: What difference did my efforts make to U.Va.? What did I do to contribute to my school/units goals and success? Did my efforts further the University's mission? Did I take a leadership role when the opportunity arose?

Don't use the self-review as a bargaining chip. This is the time to show not tell. So, it's not the time to talk about your compensation. Be clear about your accomplishments and save salary discussions for later.

Use appropriate language. Choose words that demonstrate some objectivity and distance. Yes, you're writing about yourself, but you can still stand back and offer a little perspective. For example, instead of mentioning your sparkling personality, document specific behaviors like your ability to get along well with others. Rather than say how much you like your job, include the ways that you have grown and improved during the evaluation period.

Suggest specific improvements. The self-evaluation is a good opportunity to identify specific ways to improve your performance. Don't be afraid to mention ways that you can do your job more effectively. Making suggestions like this is not the same as holding something up as a weakness. Indeed, it is a mark of strength and professional maturity for employees to identify ways to grow and improve.

Complete the Learning and Career Development Action Plan. Choose, complete, and apply knowledge you gain from development activities to support your performance goals, your competency development and your career direction.

Write more than one draft. The self-evaluation is part of your employment record so you'll want to "get it right". Make certain you are thorough and professional in your approach and language. And, that you write, review, and revise your self-evaluation to ensure you "Send Forward" your best work.