



Tips and Best Practices for Writing an Effective Self Appraisal

Overview: Performance Management is a partnership between managers and staff that provides an opportunity for the delivery of clear and thoughtful feedback and honest discussions around goals and accomplishments.

A self-appraisal is an integral part of the performance management process as it provides insight into accomplishments, skills, challenges, development needs, and career aspirations.

Below are tips and best practices for writing an effective self-appraisal:

- At the beginning of each appraisal period, create documentation for tracking progress towards your 3-5 high-level goals. Throughout the year, note significant milestones, successes, kudos, and challenges encountered in reaching those goals.

Be sure to include duties performed both within and outside the normal scope of your job. If you don't have a document listing these already, review your calendar, emails, to-do lists, and job description to gather this information. Consider the following:

- How successful have you been in achieving your goals?
 - With whom did you partner?
 - What were your biggest challenges? How did you overcome them?
 - What would you say is your most significant contribution?
 - What are you most proud of?
- Do include how you adjusted your work during this review period along with what you learned. Think about time management, customer service, completion of tasks, communication, working on or managing a remote, on site, or hybrid team. Call out examples of new skills gained, adaptability, flexibility, creativity, innovation, teamwork and so on.
 - Reflect on what facilitated successful change in your work and your ability to adapt, and what will be needed going forward to help you to continue to successfully navigate your work.
 - Gather and include specific, relevant data, facts and metrics to showcase your accomplishments. Consider comparing the data year over year to reflect growth. For example, if you do a significant amount of work in Workday, run the view more processes report to review the number and types of transactions you've completed.
 - Include informal and formal learning opportunities you participated in including information on eLearning, on-the-job learning, instructor-led courses, articles, talks, videos and other professional development activities you participated in along with a brief summary of your learning and its impact on your performance.
 - Set the stage for defining performance and professional/career development goals going forward. Be well-prepared to discuss what you have learned, work priorities, your capabilities, newly-acquired skills and how these can inform your job goals and career aspirations.