

How to prepare a Self-Evaluation

During the annual performance evaluation process, each employee is asked to submit a self-evaluation. The self-evaluation includes how you demonstrated the position specific and core competencies, as well as an assessment of how you did against any assigned annual goals. We recommend using the [Performance Evaluation Form](#) for the self-evaluation.

In sections 1, 2 and 3 of the Performance Evaluation Form, please provide a brief assessment of how you feel you have demonstrated the position specific and core competencies for your role. If you have direct reports, supervisor competencies are included in section 2. The competencies should be aligned with your position description and be known to you up front at the beginning of the year. For each competency, provide a brief example or two of how you have demonstrated the competency in the “Employee Comments” section. While not required for every competency, you may also want to suggest opportunities for further development in the coming year. Here are some examples:

FOR EXAMPLE ONLY

Section 1: Position Specific Competencies & Accountability	In the past 12 months, how has the employee demonstrated this competency?	How will development of this competency continue in the coming year?
	<i>Employee Comments</i>	<i>Employee Comments</i>
Budget management	Reviewed revenues and expenses on monthly basis and ensured unanticipated expenses were covered, resulting in the department coming in at budget.	Work with team members to improve budget forecasts.
Decision making	Made the decision on how many students we could take on a career exploration trip, including calculating option expenses and seeking feedback from key stakeholders.	Seek training on Responsibility Charting and apply the tool to key department decisions.
Section 2: Supervisor Competencies	In the past 12 months, how has the employee demonstrated this competency?	How will development of this competency continue in the coming year?
	<i>Employee Comments</i>	<i>Employee Comments</i>
Help staff members to prioritize and manage workload.	Established our top 10 priorities for the year and revisited them (adjusting as needed) during weekly staff meetings.	Establish annual objectives for each team member and revisit on quarterly basis.
Section 3: Lawrence University Core Competencies	In the past 12 months, how has the employee demonstrated this competency?	How will development of this competency continue in the coming year?
	<i>Employee Comments</i>	<i>Employee Comments</i>
Anticipates needs of constituent groups.	Identified the likelihood that snow removal would be necessary the morning of the Admissions event and secured extra custodial help for that morning.	Meet with constituents at beginning of year to identify upcoming needs.
Strives for continuous cultural learning through any available opportunity.	I attended all Diversity & Inclusion campus-wide training events and Cabaret.	Become a member of ARWAG to increase my understanding of white privilege.

Some employees may have annual performance goals or objectives that are in addition to competencies. Annual goals are specific activities that pertain to a particular person in the role and/or a particular point in time. If you have personal goals, these can be recapped in Section 4 of the Performance Evaluation Form. Here are some examples:

FOR EXAMPLE ONLY

Section 4: Additional Feedback/Overall Summary
Goal: Draft the Life after Lawrence Final Report by May 1. Assessment: Final Report completed by May 1 and endorsed by Board of Trustees on June 1.
Goal: Recommend an approach for reducing the budget by 5% by January 1. Assessment: Identified cost savings of 10% by January 1 of which 5% taken during budget process.
Goal: Hire three new custodians by September 1. Assessment: Due to unanticipated employee retirement, four new custodians hired by September 1.
Goal: Raise \$1.5 million during Annual Giving Day. Assessment: Raised \$1.9 million during Giving Day, exceeding goal by \$400,000.

Ideally, annual goals or objectives for the upcoming year are discussed at the annual performance evaluation discussion in late fall/early winter and finalized in January. Sometimes goals are deprioritized by a supervisor, or modified or adjusted. It is appropriate to mention that in the self-assessment. This is also the place to highlight any additional accomplishments during the evaluation period. The difference between an accomplishment and goal is that goals are typically planned, and may or may not have been accomplished. An accomplishment may be the completion of a specific goal, but may also be an achievement that arose out of unexpected circumstances. The key here is to include milestones or specific one-time achievements, rather than a listing of day-to-day activities normally expected of the position.

When drafting the self-evaluation, it is important to keep your comments brief and concise. The self-evaluation should be a summary of your key accomplishments and skills from the past year. It should not be a lengthy list of every responsibility and task. Ideally, it should take no more than 1-2 hours to complete your self-evaluation for the year. Your HR Representative is available for consultation as needed.