

The Power of Performance Appraisals

Presented by the HR Employee Success and
Talent Development Team



A G E N D A

01

Writing the Self-Assessment

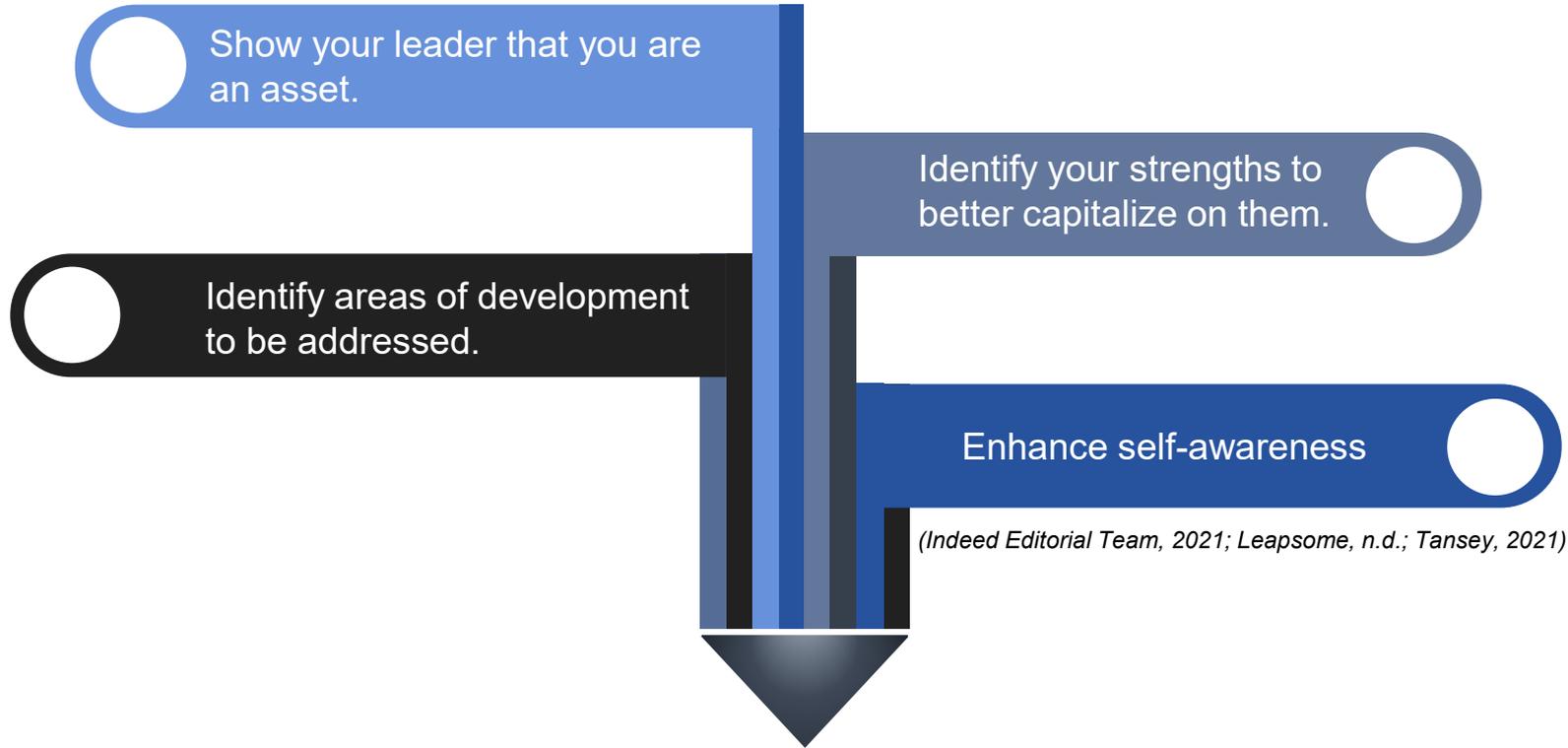
02

Effective Goal Setting

03

Tips for Your Meeting and More

Preparing for the Self-Assessment



Value of Self-Assessments

Research and Reflect Before Writing

01

Identify
how you
feel

02

Review job
description

03

Review
goals and
notes

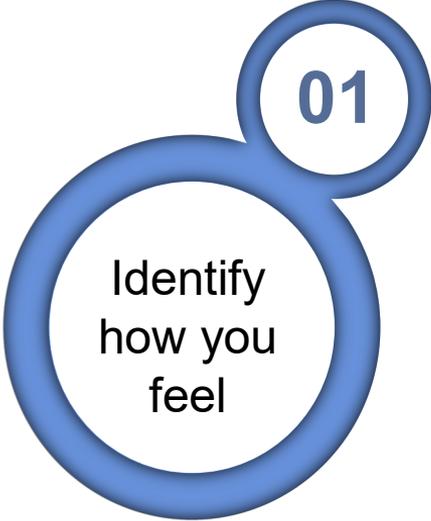
04

Review
feedback

05

Reflect and
record key
findings

(Lattice Team, 2021)



01

Identify
how you
feel

- Acknowledge your past performance review experiences and how they have impacted you.
Tip: Read through last year's appraisal.
- Talk to someone you trust or try journaling.
- Be prepared to give equal weight to accomplishments and shortcomings.



02

Review job
description

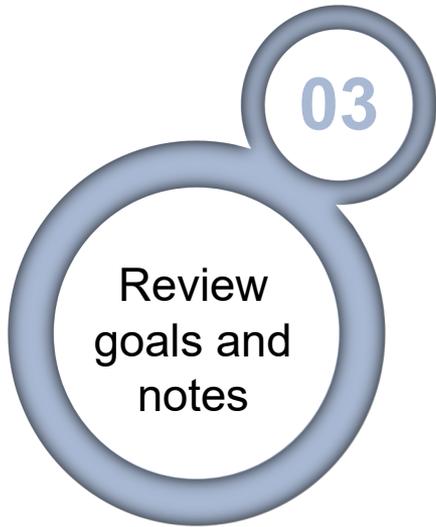
Answer key questions:

- What are your highest priority duties?
- How have you delivered on those duties?
- What responsibilities have you taken on that are not in the job description?
- Where have you improved?
- How does what you do positively impact the team and customers?

What else?

Job descriptions are available at
www.collin.edu/hr/hrcompensation.

(Indeed Editorial team, 2021; Iñiguez, 2022; Lattice Team, 2021; Leapsome, n.d.; Strickland, 2019)



Answer questions about goals:

- Did you accomplish your goals?
- If so, how?
- If not, why?

Answer questions about your performance notes.

- What are your standout accomplishments?
- What impressive statistics outline your contributions?
- Where did you miss the mark?

If you are not currently keeping track of accomplishments throughout the year, start now for next year!

(Indeed Editorial team, 2021; Iñiguez, 2022; Kenjo Blog, n.d.) Lattice Team, 2021; Leapsome, n.d.; Strickland, 2019)

04

Review
feedback

- What has your leader said?
- What have colleagues said?
- What have students/community members/customers said?
- What have your direct reports said?

*Identify key quotes to include in your performance review.
Remember not to include student names or other identifiable details.*



05

Reflect and
record key
findings

- Identify top attributes, qualities, and skills.
- Identify what to keep doing, what to stop doing, and what to start doing.
- Create a Word document with all key performance indicators.
- Start dragging and dropping content you have identified in each area.

Tips for Writing Self-Assessments

Reminders for Your Self-Assessment



- Brag but be honest.
- Use detailed bulleted lists or concise narratives.
- Outline accomplishments, as well as challenges.
- Be specific, articulate, and thorough.
- **Faculty: The performance review self-assessments for the most recent two years are what will be included as the self-evaluation for your multi-year contract.**

Reminders for Your Self-Assessment

- Do not wait until the last minute to get started.
- Do not copy information from prior appraisals.
- Do not copy examples from the instructional text.
- Do not include personal/medical information.
- Use spellcheck and proofread.
- Avoid acronyms.
- Write your self-assessment as if a third party with no knowledge of your role or the college will be reading it.

Write a Strong Self-Assessment



Identify quantifiable impact and outcomes, not activities.



Use examples and facts.

Competency: Customer Service

Received 15 thank-you emails and frequent positive feedback from students. Emails indicate I was “quick to respond” and “helpful.”

Competency: Advising/Supporting Students

Presented a one-hour session on MLA documentation during the Writing Center’s “Seminar Series” that was attended by 40 students and received an average score of 4.5 for usefulness on the post-session feedback survey.

Competency: Teaching

Implemented team-based learning approaches in ENG102 and ENG103, which increased engagement. Student evaluation scores rose from 3.3 for learning environment to 3.7 following implementation.

Write a Strong Self-Assessment



Tie individual contributions to team success.



Use “I” and action verbs



Be honest and open about challenges and improvements

Tie Contributions to Team

“By contributing my expertise in [skill], our team was able to accomplish [achievement].”

Challenges

“I want to work on _____.”

“I have learned _____ from _____.”

“I want to develop myself as a leader through _____ workshops and _____ courses, I will gain _____.”

“I showed progress in _____ this year, but I want to improve in _____.”

Action Verbs

Overhauled

Enforced

Accelerated

Displayed

Executed

What else?

Use the STAR Method

Describe a **situation** or
task.

01

Identify the
action taken.

02

Describe the
result.

03

More on STAR
Method at:

<https://www.peoplegoal.com/blog/10-annual-performance-review-employee-self-evaluation-examples>

“We lost our connection to _____ at the busiest time of day. I remained calm, sent out a district-wide notification email, and followed troubleshooting procedures. The college was back up and running with _____ in 20 minutes.”

Self-Assessment Examples

Tips for Writing About Achievements (Staff/Faculty)

- Identify improvements, challenges you took on, and areas where you excelled.
- Do not list items that are part of essential job duties.
- Structure as "I excelled at **(skill)** by focusing on these **(methods)** and as a result achieved **(outcome)**" or "I accomplished **(task)** which resulted in **(outcome)**."

Examples – Achievements

What makes these comment well-written?
Is there anything you would add or change?

"I have improved my monthly metrics year over year, most notably improving _____ through _____."

"I've effectively managed my team of three direct reports to go live with Workday for all coaching and disciplinary notices."

Assisted with the Student Conference by booking speakers, coordinating space, and designing marketing materials

"This year, I exceeded my sales target by 10 percent through a creative outbound email campaign in collaboration with the PR team. This resulted in me signing my largest contract for training to date. I also gathered 10 new contacts I will pursue for future business."

"I created and delivered a presentation on _____ for _____, stepping outside my comfort zone to do so. It was well received and bolstered my confidence regarding public speaking."

Tips for Writing About Teaching (Faculty and Select Staff)

- Identify what went well in the classroom this year and what challenges you faced.
- Tie back to COE criteria:
 - Facilitate learning of fundamental body of knowledge.
 - Teach students to apply, critique, analyze, and build upon fundamental body of knowledge.
 - Use current materials, research, and instructional methods.
 - Provide meaningful feedback that is timely and effective.

Example – Teaching

Build and evaluate knowledge:

- Conduct chapter reviews as team-based games
- In-class activities and practice exams were used to identify areas for further studying
- Review sessions prior to all exams

Apply concepts to current events:

- Tied current news stories to key government topics

Engaged students:

- Scheduled five-minute debates, where students were able to discuss current events and issues while applying course material
- Called to check up on students who were absent or not submitting assignments
- Partnered up team members for in-class assignments
- Used reflection questions to stimulate group discussions
- Used polls, videos, Kahoots, and break-out sessions in online course sections

Constantly innovate:

- Reviewed and revised course syllabi based on feedback from previous years' student evaluation
- Used new technologies in classroom, including Kahoot

Example – Teaching

I redesigned the online eight-week express _____ course I teach. Based on student feedback indicating that deadlines were too challenging, I implemented a self-paced course. Student evaluations indicated that this option worked much better. I received a rating of _____ out of 5.0 for course management. Comments included, “ _____” and “ _____”.

Tips for Writing About Advising and Supporting Students (Faculty and Select Staff)

- Quantify (where applicable) wherever possible.
 - Identify outcomes (where applicable).
- Serve as Academic Planning Coach, 20XX-present
 - Judged _____ for _____, Fall 20XX
 - Serve on _____ Student Committee, 20XX-present
 - Judged _____, Spring 20XX
 - Advised 15 students seeking a _____ degree, Spring 20XX
 - Wrote ___ student recommendation letters related to _____ and _____,
 - Interviewed by a _____ graduate student to support a graduate student's graduate studies in _____ and continue my responsibilities as a recognized Fellow in my field.
 - Mentored former Collin College student writing an article for publication regarding _____.

Tips for Writing About Professional Development (Faculty and Staff)

- Categorize by type of professional development.
- Provide dates of attendance/completion.
- Give number of hours (where applicable).
- Identify how professional development supports enrichment in current and future roles.

Consider:

LinkedIn Learning, Collin College events and classes, conferences, webinars, presentations given, authored materials, read materials

Examples – Professional Development

CONFERENCES ATTENDED/PRESENTED:

- **Participated, The XX Annual International Conference on _____, City, State, Summer 20XX**

The two-day conference consisted of ____ sessions each morning and afternoon followed by a series of hands-on workshops that required participants to work through _____ exercises as “students.” This conference benefited my students as we now spend more time having them learn how to read critically. Students are required to _____ in my classes. The tools learned at the conference have improved my _____.

- **Attended, “Assignment Alignment” by _____, Faculty Development Conference,**

- **Fall 20XX Presented, “ _____,” Faculty Development Conference, Spring 20XX**

- **Presented, _____, “ _____,” Spring 20XXX**

- **Attended, _____ Conference, City, State, Spring XXXX**

This was an especially engaging conference that focused on _____. Whenever I am teaching, I try to _____. I look forward to being able to incorporate new information into my classes based on some of the _____ I attended. For example, _____. Perspectives from these papers benefit my _____ students. Probably the most fascinating sessions I attended dealt with the _____. Learning about some of the intricacies in _____ specifically will allow me to highlight _____ to my students.

Examples – Professional Development

TRAININGS COMPLETED:

- “Effective Communication,” Leading for Excellence Academy by Collin College HR, two hours, April 20XX
 - I learned ____ and ____, which I used _____.
- “De-escalating Tense Classroom Situations,” Center for Teaching and Learning, one hour, April 20XX

BOOKS READ:

Banta, Trudy W. and Palomba, Catherine. *Assessment Essentials, Planning, Implementing, and Improving Assessment in Higher Education*. San Francisco, CA: Jossey-Bass, 2015.

- I was able to implement ____ in the classroom as a result.

ARTICLES READ:

ESSAYS READ:

Tips for Writing About College Service/Core Values (Faculty and Staff)

- Identify the committee/task force/council/project, your role, and length of service.
- Define the committee's mission.
- Explain responsibilities and contributions.
- Describe achievements during your service.
- Identify time commitment.

- **Co-Chair, _____ Committee, 20XX-20XX**
 - "This committee plans and organizes events and activities for _____." As co-chair, I liaison between _____ and _____, call meetings, give input during the annual budget process, and create drafts of the _____.
 - Provide bullet points of what the committee has achieved during time of service.
- **Serve, Discipline Appeals Committee, 20XX-present**
- **Serve, Academic Planning Coach, 20XX-present**
- **Serve, Online Advisory Board, 20XX-present**
- **Served, Faculty Annual Performance Appraisal Demo, Spring 20XX**
 - HR brought together several stakeholders to run a demonstration of how Workday would work for faculty and administrators.

NOTE: I have attached a separate document that outlines my duties as _____ for which I receive a stipend.

Tips and Example for Essential Functions (Staff)

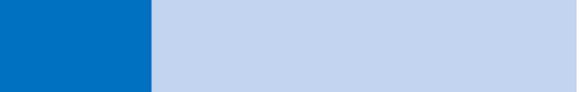
- Categorize comments by key responsibilities or projects.
- Be specific by using examples and figures.

This year was a significant year for the team in terms of growth. The team size increased by 70 percent. Six months of this year was on training on essential functions to ensure all team members have the same knowledge and understanding of core business practices. In addition, all SOPs were updated in preparation for Workday implementation.

Example for Customer Service (Staff)

My role as the informational desk assistant is to answer 75 to 100 inbound calls a day and greet visitors as a resource and often the first touchpoint with the college. Phone metrics confirm that I answer 80 percent of calls by the second ring. Here's what customers have said via complimentary emails and comments to my supervisor: "_____ is very professional." "I can hear a smile in her voice when I speak to her."

I am continually working to improve the customer experience by [insert specific examples here].



Tips for Writing About Student Evaluations (Faculty)

- Do not copy and paste long passages from student evaluations.
- Summarize key trends, both positive and negative.
- Provide supporting comments/ratings from evaluations as examples.
- Explain next steps.

Example for Communication (Staff/Faculty)

I tactfully provide difficult feedback and approach sensitive situations with empathy and respect. For example, one of my direct reports was continuously cutting people off during conversations. Over the past four months, this was tracked during one-on-one sessions and progress was monitored. I worked with the team member to be more self-aware by using nonverbal cues in meetings. I have noticed only one occurrence of interrupting in the last month, a significant improvement.

Example for Quantity and Quality of Work (Staff/Faculty)

Developed and co-facilitated a two-hour session on performance documentation for _____. Received overall score of 5.06 out of 5.0 for professional development value from 21 leaders; one person gave a rating of "6+." Here's some of what attendees said: "Great session. I feel much more prepared to deal with faculty and staff concerns." "The information is timely and immediately applicable to my role/responsibilities." "Great scenarios and great discussion during the scenarios!"

Goal Setting

Setting 2023-2024 SMART Goals

S Specific

M Measurable

A Attainable

R Relevant

T Timely

Goals should be challenging, meaningful, and tied to team goals/mission, performance indicators, or professional improvement and development.

Plan and deliver four Workday educational webinars by June 10 with 25+ attendees and an 80%+ satisfaction rating average per webinar.

Examples of Inappropriate or Inadequate Goals

Improve my presentation skills.

Serve on the Safety Committee.

Survive COVID.

Lose 10 pounds and become more physically active.

Ensure 85%+ completion rates on student evaluations.

Maintain 95% student pass rate for ENG1301.

What are the concerns with each of these goals?

Breakout Room:

How can you make your 2023-2024 goals SMART?

Discuss this with your colleagues.

Consider:

- Your essential duties
- Personal and team strengths and challenges
- Career development
- Team mission and goals
- Measures of success
- Upcoming projects and initiatives

Additional Considerations

Reasons Your Self-Assessment May Be Sent Back

- Feedback not provided in a required section.
- Insufficient commentary.
- **Staff member rates in H-K but does not supervise others, or supervises others and does not rate in H-K.**
- **Faculty provides comments for professionalism.** Pay attention to instructions in self-assessment.
- 2023-2024 goals are not included and evaluated.
- Information is inaccurate or embellished.
- Content is of a personal nature.

Prepare for Your Appraisal Meeting

- Avoid defensiveness.
- Acknowledge inaccurate or exaggerated information.
- Do not shift blame – be accountable.
- Be present with an open mindset, ready to learn and grow.
- Remember that all of us are at Collin College to serve our students.
- After a two-year pandemic, inflation, and other global challenges, think about how you can be a catalyst for positive change.



Prepare for Next Year!

If employees spend 10 seconds a day writing down their one biggest accomplishment, success, metric hit, feedback received for that day, they'd have 10 times more data than they'd ever need for a self-assessment.

- Create an Outlook folder for kudos and other performance review materials.
- Maintain monthly metrics if you do not already.
- Keep a tracking spreadsheet.
- When finishing a project, reflect and record results.
- Glance through your inbox and sent folders for key information.

S U C C E S S
F A V O U R S
T H E
P R E P A R E D

Thank you!

Questions? Contact
professionaldevelopment@collin.edu.



Resources

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