Tips for Employees
Participating in Your Own Performance Appraisal: Tips for Employees

The Pre-appraisal Checklist and Preparing for the Appraisal

1. Be sure your supervisor notifies you of the date, and that you have enough time to prepare. A conference room is a good choice for privacy and no interruptions. Be sure your supervisor schedules enough time for discussion [1 - 1-1/2 hours].
2. Gather:
   o the job description and performance standards*****
   o goals set from the last appraisal
   o your own documentation notes, status reports, or self-assessment
3. If you have been asked to do a self-appraisal, be sure to ask how this will be incorporated in the appraisal meeting and be sure you have been given enough time beforehand to fill out the appraisal.
4. Before preparing your self-assessment documentation, take a moment to:
   o list your main areas of responsibility
   o areas you have done well
   o areas you need to improve in
   o what you need from your supervisor to do a better job
5. Remember to:
   o Be comprehensive, but concise and specific. ["I believe flexibility is one of my performance strengths. This is demonstrated in the way I handled the constantly changing priorities during Fiscal Close in June."]
   o Be as objective, honest, and realistic as possible. Employees have a tendency to rate themselves consistently lower than their supervisors rate them.
   o Compare your performance to the expectations, standards, and goals that were set.

Writing it down and putting it all together

- What are your major accomplishments?
- What could you have done better?
- Do you understand what is expected of you? Are performance standards and work rules clear?
- What training or professional development do you need?
- Would you like to see your responsibilities change? How? Why?
- What career goals do you have? What do you need to attain those goals?
- How are relationships going with your co-workers? What could they do to help you perform your job better?
- What could your supervisor do to help you perform your job better?

*Standards are SMART: Specific; Measurable; Attainable; Relevant; Timely. Do you have Performance Standards for your job? If not, ask your supervisor about them.