



# COMPLETING YOUR SUMMARY OF ACCOMPLISHMENTS

PERFORMANCE MANAGEMENT – EDUCATIONAL SESSION ONE

WEBCHAT WITH ELAINE SCHILLING – 26 APRIL 2016

# Completing Your Summary of Accomplishments (SOA)

An overview of completing your Summary of Accomplishments for performance in FY 15-16

# Summary of Accomplishments (SOA)

- The SOA is an integral part of the performance appraisal process.
- It is your written narrative of your accomplishments as it relates to your job responsibilities, competencies, goals and objectives, and other factors.
- It is informed by what you and your supervisor have discussed regularly throughout the entire performance appraisal cycle (quarterly/semi-annually)

# Summary of Accomplishments (SOA)

*An opportunity and an invitation:*

- It is an opportunity for you to facilitate a discussion with your supervisor about your performance over the last performance appraisal cycle.
- It is an opportunity for you to shine a light on what you've accomplished; be your own advocate.
- It invites you to be an engaged partner in discussing your performance and planning for future performance.

# Summary of Accomplishments (SOA)

Resources to gather:

- Goals for the past year
- Performance expectations and standards
- Job description
- Individual development plan
- Feedback you have received from your supervisor
- Feedback you have received from customers, peers, others

# Guidelines for writing your SOA

- ❑ SPECIFICS MATTER: Use specific examples – they add credibility.
- ❑ DATA-DRIVEN METRICS: Use numbers or metrics, if appropriate.
- ❑ ACCURACY: Do not exaggerate. Your SOA should help you speak confidently during your performance discussion.
- ❑ STAY ON POINT: Give relevant information. Align your feedback with specific goals, competencies.
- ❑ PRECISION: Be factual, specific, and concise.
- ❑ QUANTIFY/EXPLAIN VALUE: Tie your results to organizational goals.

# SAO Enhancements

- The form has been streamlined and clear, specific instructions have been added.

[Halogen 2.0 Summary of Accomplishments](#)

# Sections of the SOA

- Name, Demographic Information
- Instructions
- Major Contributions and Accomplishments
- Major Challenges, Obstacles, and Unanticipated Developments
- Core Competencies
- Future Goals for Next Review Cycle
- Additional Comments

Substantiate, describe impact

# Sections of the SOA

## Major Contributions and Accomplishments

- Goals, expectations met and what was the impact of your achieving them?

*For example:*

- I cross-trained three co-workers to use the new scanning equipment. Three months later I conducted a follow-up training when they still had questions about the equipment. I also created a job aid that they could use if they had questions when working alone. They are all working independently now and using the equipment efficiently.
- Professional development initiatives – did you complete your individual development plan or items on the plan? How did that help you and the department?
- Other accomplishments/contributions to your department/unit.
- What have you and your supervisor discussed throughout the year?

# Sections of the SOA

## Major Challenges, Obstacles, and Unanticipated Developments

- Note the challenges you faced and how you responded to those challenges. They may be technical or interpersonal.
- They may also involve the ability to succeed despite limited resources or difficult circumstances.
- What was the outcome of your overcoming the challenges?
- *For example:*
  - After the due date was accelerated for Project X, I worked on three high priority assignments simultaneously for three months. A challenge, as we discussed, was keeping all project stakeholders informed on the status of their project. To ease that challenge, I searched for and used project management software shared by a colleague at UCLA. Since then, stakeholders have said they appreciate getting relevant, timely information.

# Sections of the SOA

## Major Challenges, Obstacles, and Unanticipated Developments

- What obstacles got in the way of your accomplishing your goals?
  - How did you respond?
- What changed? What changes were unanticipated and affected your ability to accomplish your goals?
- What skills did you use, develop?
- What have you and your supervisor already discussed throughout the year?

# Sections of the SOA

## Core Competencies

- ▣ Apply the core competencies to how you did your job.
- ▣ Pick one or two competencies where you feel that you are either particularly strong or have demonstrated improvement during the last year.

*For example:*

- I polled our unit's customers to find out how they used the two financial reports we produce and send to them each quarter. Customers mentioned that they use only one of the reports as it provides them with more detailed analysis. As a result, the unit stopped producing two reports, saving the unit 10 staff hours each quarter. Competencies used: Problem Solving and Service Focus.

# Sections of the SOA

## Core Competencies

- ▣ Pick one or two competencies where you feel you can enhance your performance with mentoring or professional development.

*For example:*

- ▣ After being asked to fill in temporarily on the department's sustainability committee, it became evident to me that I was not familiar with UCM's campus sustainability goals. Because of this, I was not able to contribute to the group discussions and recommendations as much as I had hoped. I would like to develop my knowledge in this area.  
Competency: Resources Management and Sustainability.
- ▣ Provide a specific example for each competency you choose, and the result of your using the competency.

# Sections of the SOA

## Core Competencies

1. Communication
2. Diversity and inclusion
3. Employee engagement
4. Innovation and change management
5. Job mastery and continuous learning
6. Resources management and sustainability
7. Results orientation and execution
8. Service focus
9. Teamwork and collaboration
10. Solving problems
11. Quality assurance and assessment
12. People management (for managers)

# Sections of the SOA

## Future Goals for Next Review Cycle

- Before meeting with your supervisor, think about potential goals for the next performance review cycle.
- Your supervisor will consider your feedback, identify and incorporate final goals on the appraisal form.

# Sections of the SOA

## Additional Comments

- What would you like to discuss? For example:
  - Career planning, professional development, or other areas
  - Where can you grow professionally to assist your department as it meets initiatives (e.g., Project 2020, the Strategic Academic Focusing Initiative)
  - Align your aspirations to your current duties or organizational success (goal alignment).
  - If you need help reaching your goal, state how your supervisor can help - within reason.
  - Highlight mutual benefit – how both you and the organization will benefit from your development

# Track your accomplishments

Ways to capture accomplishments throughout the review period:

- ▣ Make note of the accomplishments you've discussed with your supervisor during the year
- ▣ Note the completed goals as discussed with your supervisor
- ▣ Identify problems you have solved, helped solve
- ▣ Letters of thanks, commendation
- ▣ Customer service feedback
- ▣ Development (e.g., classes, conferences, cross-training)
- ▣ Internal/campus committee work
- ▣ Special projects

# How will your SOA be used?

- Your supervisor will review and consider your feedback prior to finalizing the appraisal form.
- Your feedback can help clarify any gaps between your understanding of job expectations, goals and standards, and those of your supervisor.

# Key Points about SOA

- The SOA is an opportunity for you to facilitate a discussion with your supervisor about your performance.
- It is a chance for you to record what you have accomplished.
- You can also note areas in which you would like support and/or further development to overcome challenges, obstacles; to express concerns you have about fulfilling your job responsibilities as they relate to UCM's core competencies.
- You are working in partnership with your supervisor.
- Your SOA will be informed by your regular discussions with your supervisor (quarterly/semi-annually)
- You know best what you have done – present it clearly, with examples – substantiation. Be your best advocate.

# SOA: Timeline

- April 27, 2016 – SOA opens in Halogen 2.0 for completion
- May 19, 2016 – Performance appraisal opens in Halogen 2.0 for completion
- June 30, 2016 – Staff complete SOAs on or before
- June 30, 2016 – SOA closes; no extensions will be granted

# Upcoming Webchats

- Join us on the next 2 webchats scheduled, as follows:
  - Tuesday, May 3 from 3:30 to 4:30  
“Core Competencies and their Role in Performance Appraisals”
  - Wednesday, May 18 from 2:30 to 3:30  
“Establishing Meaningful Goals”



# END: COMPLETING YOUR SUMMARY OF ACCOMPLISHMENTS

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