

# Performance Appraisal Self Assessment

## Download:

 Performance Appraisal Self-Assessment (www.shrm.org/ResourcesAndTools/tools-and-samples/hr-forms/Documents/Performance%20Appraisal%20Self%20Assessment.docx)

Employee Name: Earnestine White Date: 12/19/2023

Job Title: Program Director Location: 701 W. Ormsby Ave. Ste 201

Supervisor's Name: Board of Directors

Performance Review Period: Annual

## Employee Instructions:

**Please complete and return this self-evaluation to your supervisor by [date].**

Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your progress and accomplishments since the last performance review. If you have been employed by the company less than a year, substitute references to "since the last performance appraisal/review" with "since you were hired" and answer the questions accordingly.

1. List your most significant accomplishments or contributions since last year. How do these achievements align with the goals/objectives outlined in your last review?

Increased in the number of tax returns prepared annually.

Increase in VITA funding

Increased in the number of Volunteers annually

Increased in the number of VITA sites annually.

Increase in the number of employees

2. Since the last appraisal period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If so, please specify.

Facilitation of the Money Smart Curriculum at two (2) community centers.

Implemented the Financial Savvy Leaders of the Future Program

3. What activities have you initiated, or actively participated in, to encourage camaraderie and teamwork within your group and/or office? What was the result?

Implemented monthly Site Coordinators Meetings Provided stipends to volunteer site coordinators

Site Coordinators and Staff retreat at the end of the tax season

These activities have resulted in site coordinators having more input in the program and more team work

4. Describe your professional development activities since last year, such as offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, exposure to challenging projects, other—please describe.

Digital solutions class

VITA certification - Advanced

FASFA - training

VITA - Foreign Student Certification - and trained four paid staff & 2 volunteers

5. Describe areas you feel require improvement in terms of your professional capabilities. List the steps you plan to take and/or the resources you need to accomplish this.

Digital communication - being able to adapt to the changing environment where digital communication has replaced older forms of communication like writing and sending letters and face-to-face communication.

1. I plan to take part II of the digital solutions certification
2. I plan to share what I have learned with staff and volunteers

6. Identify two career goals for the coming year and indicate how you plan to accomplish them.

Increase my network of professionals by attending networking events and connecting with professionals online.

Increase technical proficiency by attending training courses and online tutorials

7. Evaluate yourself on all factors that apply to you since your last performance appraisal, or date of hire if employed here less than one year. If a category does not apply to you, indicate N/A.

**Rating Scale:**    **4** - Outstanding/Role Model        **3** - Very Competent  
                              **2** - Satisfactory                                **1** - Inexperienced or Improvement Needed

Category	Self-Rating
a. Technical Skills related to your specific job	<u>2</u>
b. Technical Knowledge (up-to-date on industry/discipline news, articles and best practices)	<u>2</u>
c. Quality of Work Product (comprehensive, accurate, timely, etc.)	<u>3</u>
d. Utilization or Productivity	<u>4</u>
e. Business Development	<u>3</u>
f. Project Management Skills	<u>4</u>
g. Technology Skills	<u>2</u>
h. Time Management & Organizational Skills	<u>4</u>
i. Interpersonal Skills (positive attitude; ability to get along well with co-workers/clients/vendors)	<u>3</u>
j. Communication Skills—Verbal/Written (proposals/reports, letters, e-mails, etc.)	<u>3</u>
k. Innovation or Creativity	<u>3</u>
l. Collaboration/Teamwork	<u>4</u>
m. Mentoring Skills	
n. Employee Policies (knowledgeable of and compliant with company policies and procedures)	<u>4</u>
o. Leadership Skills (applies to anyone—not restricted to supervisory level employees)	<u>3</u>

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p. Professionalism (punctuality, attendance; conduct; responsiveness and follow through)

4

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q. **Overall**

3

8. Name any other management personnel, besides your current supervisor, that you feel should provide input toward your performance appraisal.

N/A

***Thank you for taking the time to complete the Employee Self-Assessment.***

**Supervisors: Attach completed Self-Assessments to the Employee's Performance Appraisal and return to HR.**

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