A Self Evaluation is required for Administrators' Association employees.

ACCESS THE SELF EVALUATION

- Navigate to your Workday inbox. Select "Self Evaluation."
- Expand the template with the "**Toggle Full Screen Viewing Mode**" button for a full-screen view of the self evaluation template.

GOALS

Probationary employees, **SKIP THIS STEP**. You will be prompted to develop goals with your manager directly after your 3-month evaluation is complete.

- **If you added goals last year, they will automatically roll into this year's evaluation.**
- **Update the status and add a rating and comment to each existing goal.**
- **Add additional goals* completed or in-progress from the 2020-2021 year. If you and your manager have not formally agreed on goals for this time period, click Next to skip this step.**
  - o Click Add
  - o Add the name of the goal in the **Goal** field
  - o Add a description in the **Description** field
  - o Add a **Due Date**
  - o Select a **Status** (add a completion date if you selected Completed)
  - o **Milestones** break a large goal down into manageable action items. These are optional. Add as desired.
  - o Select a **Rating**
  - o Add a **Comment**

*The primary difference between the two types of goals is that performance goals focus on an end result while development goals focus on the attainment of skills and knowledge. Additionally, performance goals are job-oriented, while developmental goals are learning-oriented.

- o Click **Next** to proceed or **Add** to add another 2020-2021 goal
- **Do not add goals for 2021-2022 at this time.**
- **You will be prompted to do this after your evaluation is complete.**

COMPETENCIES

- Navigate through each **Competency** of the Evaluation. *For a complete list of competencies jump to page 5.*
- Assign a **Rating** to each
    - The last competency <u>Impact on Students/Student Learning Outcomes</u> may not apply to every role. If this competency is not applicable to your role, select Not Applicable in the rating, and note Not Applicable in the Comments section. Not Applicable is not an appropriate rating for any other competency and should not be used.
- Enter **Comments**
- Select the **Checkmark** on the right side of the Competency to save your responses
- Select the **Pencil** to expand the next section
- Select **Next** to navigate to the next section of the assessment

PROFESSIONAL/PERSONAL ENHANCEMENT PLAN

Probationary employees, **SKIP THIS STEP**. It is not necessary to focus on your professional/personal enhancement during your first year.

Add development goals, as desired. The primary difference between the two types of goals is that performance goals focus on an end result while development goals focus on the attainment of skills and knowledge. Additionally, performance goals are job-oriented, while developmental goals are learning-oriented.

- Add the name of the **Development Item**
- Describe the Development Item in **Additional Information**
- Select a Status
- Click **Next** to proceed or **Add** to add another Development Item

SUPPORTING DOCUMENTS

Attaching supporting documents is optional. Examples of supporting documents might include: an email from a colleague, work product, relevant metrics, etc.

- Navigate to the **Supporting Documents** section of the template.
- Select the **Add** button and then select the **Attach** button.
- Select your supporting documents.
- Select "**Next**".
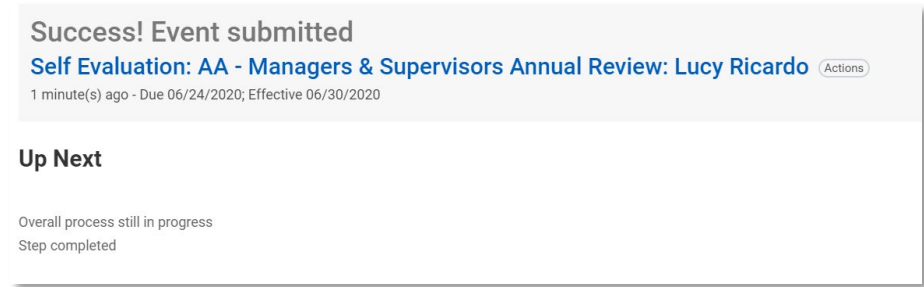

OVERALL

- Assign an overall **Rating**
- Enter **Comments**

SUBMIT COMPLETED SELF EVALUATION

Navigate to the **Summary** section of the template and select the **Submit** button to finalize the self evaluation. The self evaluation is then routed to your manager.

> Success! Event submitted
>
> Self Evaluation: AA - Managers & Supervisors Annual Review: Lucy Ricardo (Actions)
> 1 minute(s) ago - Due 06/24/2020; Effective 06/30/2020
>
> **Up Next**
>
> Overall process still in progress
> Step completed

SAVE FOR LATER

- Save the evaluation task for later if you are unable to complete all of the sections at one time.
- Navigate to the **Summary** section of the template and select the **Save for Later** button.
- Access the evaluation template in your Workday inbox to continue with the evaluation.

PARTICIPATE IN 1:1 DISCUSSION

- Conversations about your goals for the upcoming year may take place during this meeting. Your manager will be prompted to enter them into Workday after the evaluation process. Reference the Admin Association Guide to Goals for next steps and your opportunity to review and edit your goals.
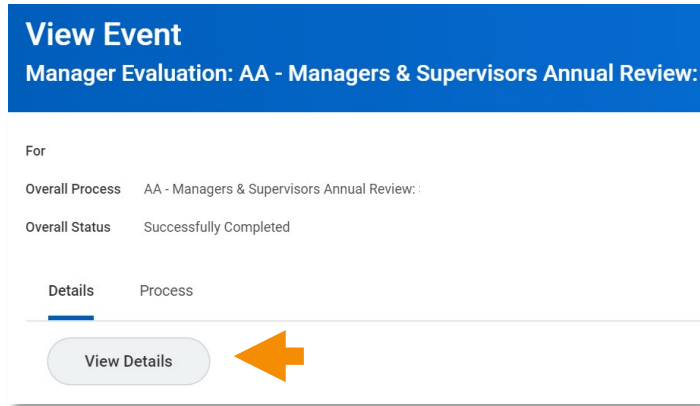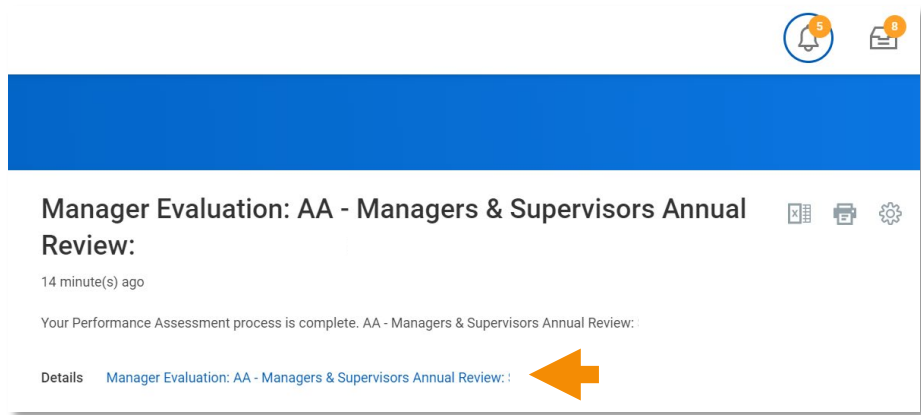
  Probationary employees, reference the Admin Association Guide to Goals to develop goals after your 3-month evaluation.

EMPLOYEE ACKNOWLEDGEMENT (After 1:1 Discussion)

- Navigate to your Workday inbox.
- Enter **I Acknowledge** in the **Status** field, and enter any final comments as a result of the 1:1 meeting.
- Select **Submit**.
- You will receive a Workday notification that the evaluation process is complete once HR has reviewed the document.
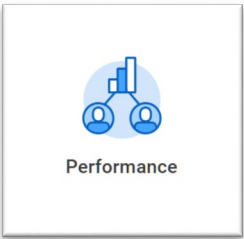
EMPLOYEE - VIEW COMPLETED EVALUATION

- Navigate to your Workday **Notifications**.
- Select the **Details** link to review the details of the entire process.

> Manager Evaluation: AA - Managers & Supervisors Annual Review:
>
> 14 minute(s) ago
>
> Your Performance Assessment process is complete. AA - Managers & Supervisors Annual Review:
>
> Details   Manager Evaluation: AA - Managers & Supervisors Annual Review:

> **View Event**
> **Manager Evaluation: AA - Managers & Supervisors Annual Review:**
>
> For
>
> Overall Process   AA - Managers & Supervisors Annual Review:
>
> Overall Status   Successfully Completed
>
> Details   Process
>
> View Details

PERFORMANCE WORKLET

- Add the Performance Worklet to your Workday home page.

- **From the worklet you can**:
  - View completed evaluations
  - View goals and development items

COMPETENCIES FOR ANNUAL & PROBATION EVALUATIONS

Leadership and Supervision: Providing clear direction to team members, having the courage to take on difficult and complex assignments, having creativity, having inspiration to motivate others, and follow-through and delivery on commitments.

Communication and Collaboration: Measures the nature of person-to-person relationships with peers, students, community members, employers and employees that are required in this role. Communicates (both verbally and written) in clear and concise manner.

Planning and Organization: Develops achievable objectives and goals. Sets logical and effective courses of action making efficient use of all resources.

Decision Making: Analyzes situations and data and makes appropriate decisions. Exercises foresight and demonstrates flexibility and resourcefulness.

Professional Knowledge and Expertise: Demonstrates the knowledge and skills required in the role to be effective. Knowledge and skills can be attained through formal education or technical training, experience, on-the-job-training, or any other effective source.

Impact on Students/Student Learning Outcomes: Identify the degree of role impact on students that facilitates effective educational processes. (If applicable) Describe your/the employee's involvement in the assessment of student learning outcomes and the use of those assessment results to improve student learning and success.