

Self-Evaluation Practice

Instructions: For each item below, have the Team Member select the most appropriate rating based on their personal view of their performance. Use the rating scale provided with each section. After the Team Member completes their review, the Manager will complete and then schedule a meeting to review.

Rating Key:

Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations
1	2	3	4

Section 1: Outcomes *Assesses the ability to achieve goals and contribute to broader organizational impact.*

	<u>Team Member</u>			
• Consistently meets individual goals and contributes to team or department objectives.	1	2	3	4
• Supports or contributes to efforts that positively impact business outcomes.	1	2	3	4
• Delivers high-quality work that needs minimal review, correction, and follow-up.	1	2	3	4
• Responds to requests and issues in a timely and thorough manner.	1	2	3	4
• Positively contributes to and engages with organizational change.	1	2	3	4

Team Member – Reflect on the key outcomes you delivered during this review period—what goals did you achieve, what impact did your work have, and how do you measure your success?

Section 2: Activities *Considers the skills and behaviors that enable effective performance.*

	<u>Team Member</u>			
• Takes initiative within the scope of their role to improve work or solve problems.	1	2	3	4
• Actively supports team efforts, projects, or cross-functional collaboration.	1	2	3	4
• Demonstrates independence in managing work and meeting deadlines on time.	1	2	3	4
• Maintains reliable, respectful conduct that contributes to strong service outcomes.	1	2	3	4
• Demonstrates a willingness to adapt and contribute to evolving priorities.	1	2	3	4

Team Member – Reflect on how you’ve applied your skills and strengths in your day-to-day work. Where have you taken initiative, supported your team, or adapted to changing needs?

Section 3: Process *Focuses on how work is performed and the approach to continuous improvement.*

	<u>Team Member</u>			
• Contributes to improving processes or practices within their area of work.	1	2	3	4
• Proactively seeks clarity on processes and expectations to ensure accuracy and alignment.	1	2	3	4
• Demonstrates an organized, thoughtful approach to daily responsibilities and workload management.	1	2	3	4
• Structures work into clear, achievable steps that support timely completion.	1	2	3	4
• Balances adherence to process with flexibility when change is needed.	1	2	3	4

Team Member – Reflect on how you organized and executed your work—how did you manage your time, plan effectively, or improve the way you approached tasks and responsibilities?

Section 4: Communication *Reviews the ability to communicate effectively and respectfully across all levels.*

	<u>Team Member</u>			
• Communicates clearly and respectfully with colleagues, customers, and stakeholders.	1	2	3	4
• Shares relevant information in a timely and appropriate manner.	1	2	3	4
• Demonstrates openness to feedback and engages in two-way communication.	1	2	3	4
• Adjusts communication style as needed for different situations or audiences.	1	2	3	4
• Asks questions to confirm understanding of the request and expected outcomes.	1	2	3	4

Team Member – Reflect on how you've communicated with others—how have you shared information clearly, listened actively, or adapted your communication style to different situations?

Section 5: Behavior *Assesses professionalism in daily interactions and conduct.*

	<u>Team Member</u>			
• Creates an inclusive environment where all voices are welcomed and considered.	1	2	3	4
• Upholds the organization’s values through consistent actions and decision-making.	1	2	3	4
• Adheres to ethical standards and organizational policies.	1	2	3	4
• Shows self-awareness and emotional control in challenging situations.	1	2	3	4
• Stays solution-focused when addressing conflict or concerns.	1	2	3	4

Team Member – Describe a time during this review period when you had to navigate a difficult interaction. How did you handle it, and what did you learn?

Section 6: Core Values *Evaluates how consistently the individual demonstrates the organization’s values.*

	<u>Team Member</u>			
• Responds to individual needs with empathy and ensures a safe, respectful experience for all.	1	2	3	4
• Supports team and customer success by being responsive, helpful, and dependable.	1	2	3	4
• Holds self to a high standard and actively looks for ways to improve team or service outcomes.	1	2	3	4
• Owns results and communicates clearly about progress, challenges, and next steps.	1	2	3	4
• Demonstrates honesty and consistency in words, actions, and decisions.	1	2	3	4

Team Member – Reflect on how your actions and decisions have aligned with our core values—where have you demonstrated integrity, respect, or contributed meaningfully to our mission and culture?

Final Reflections

Team Member Reflections

1. What are you proud of that people don't know about?
2. What goals would you like to work toward over the next year?