logo

<Replace with your business logo>

# Self-assessment: <Insert Staff Name>

Performance appraisal gives us the opportunity to review how we are all going in pursuit of our firm-wide goals. Self-assessment gives you the opportunity to review your performance and prepare some thoughts and feedback before your meeting with your manager. Please be open and constructive. We can only achieve our goals effectively when we work together.

These questions relate to your current position description

**1. Training / CPD Points**Have you completed the outlined training and CPD point requirements?  
YES NO UNSURE Additional comments:

**2. Job Purpose**Are you clear and confident on your job purpose?  
YES NO UNSURE Additional comments:

**3. Behavioral Competences/Values**

Have you met the behavioural competences / values outlined within your position description?

|  |  |
| --- | --- |
| **Competency or Value** | **Self-assessment Rating** |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |

Rating

5 = Outstanding, if the employee has achieved the performance measure on almost every occasion

4 = Above average, if the employee has achieved the performance measure most of the time

3 = Satisfactory, if the employee has achieved the performance measure some of the time

2 = Minimum standard, if the employee infrequently achieves the performance measure satisfactorily

1 = Unsatisfactory, if the employee seldom if ever achieves the performance measure

0 = Not applicable during this review period

Additional comments:

**4. Key Result Areas – Part A**Using the table below, which is partly taken from your job description, have key result areas been achieved?

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Result Area** | **Major Activities** | **Performance Measures** | **Self Assessment Has the goal been achieved? 0 - 1 – 2 – 3 – 4 - 5** |
| **Finance** | <Insert from position description> | <Insert from position description> |  |
| **Clients** | <Insert from position description> | <Insert from position description> |  |
| **Process** | <Insert from position description> | <Insert from position description> |  |
| **People** | <Insert from position description> | <Insert from position description> |  |

The following questions provide discussion points for you and your manager to explore.   
Remember this is about our business performance as much as it is about your contribution to it.

**Q5. My job — Bullet points you may wish to discuss**

* Are any of your responsibilities unclear?
* Things you’d like to do more of?
* Things you’d like to do less of?

**Q5. My organisation — Bullet points you may wish to discuss**

* Things you’d like to know more about?
* Barriers or challenges that stop you from doing a better job?
* Issues about our clients we need to improve upon?

**Q6. My career**

* Training and development I’d like to have or need to complete?
* My future in the organisation?
* Other areas I’m concerned about?