



Personal and Confidential

Self-Assessment and Goal Setting Document for Employees

The UBC strategic plan, *Shaping UBC’s Next Century*, sets out our collective vision, purpose, goals, and strategies for the years ahead. It guides our decisions and actions, inspiring the very best in our students, faculty, staff, alumni and partners. In addition, five enduring values underpin all our activities, interactions and decisions — excellence, integrity, respect, academic freedom and accountability.

The UBC Self-Assessment and Goal Setting Document for Employees is a tool that accompanies the Performance Review and Plan Document and is designed to:

- Ensure that you have input into the development of your upcoming review.
- Facilitate communication, discussion, and exchange of ideas between employees and their managers.
- Create alignment between employee and organizational goals and assist individual growth and development.
- Develop a motivated, engaged, and high-performing workforce that supports the work of the university.

Employee Information (Reviewer to Complete)	
Employee Name:	
Employment Group:	
Department:	
Area/Division:	
Position Title:	
Position Level:	

Employment Information (Reviewer to Complete)	dd-mm-yy
Initial Employment Date at UBC:	
Initial Employment Date in Department:	
Start Date in Current Position:	



Employment Information (Reviewer to Complete)	dd-mm-yy
Date of Last Review:	
Date of This Review:	

SELF-REFLECTION

Please take some time this week to carefully consider the following questions, and kindly have your response back to me by **[date]** to give me an opportunity to review before our meeting on **[date]**. Your responses will help me understand and facilitate your preferred working style and environment.

The 'Comments/Examples' fields will expand as you type if additional space is required. If you prefer to print this document and complete it by hand, you can increase the size of the 'Comments/Examples' fields by clicking or tabbing inside the box and then pressing the 'ENTER' button on your keyboard until the field is the desired size.

What do you enjoy most about your work? What keeps you here?

What do you want more of?

What is the best praise/recognition you've ever received? What made it the best?



Have you had any productive partnerships or mentors? Why do you think these relationships worked so well for you? What does a supportive manager look like for you?

Is there anything else you think might help us work well together?

SELF-ASSESSMENT

While responding to the questions below, please consider the following competencies as they will form the basis of discussion during our meeting. Please discuss with me if you would like a more detailed explanation of these competencies.

- Approach to work
 - e.g., Demonstrates initiative, flexibility, adaptability, and resourcefulness
- Job knowledge and quality of work
- Planning and organization/time management
- Judgement and decision making
- Communication/Interpersonal skills
- Personal leadership skills
 - Contributes to unit and UBC community outside of regular job duties
 - Displays healthy work-life balance
 - Takes responsibility for personal growth and development
- Safety awareness and demonstration
- People leadership and management (only applicable to supervisors/managers)
 - e.g., Motivates others and build relationships and credibility with staff
 - e.g., Promotes cooperation, fairness and equity in the unit
- Task leadership and management (only applicable to supervisors/managers)
 - e.g., Demonstrates accountability and sound judgement in managing UBC resources



- o e.g., Takes initiative to seek improvements in outputs and efficiencies

Since our last review, how do you feel you have performed in your position? What do you think your strengths/assets are (skills, knowledge, talents)? What tasks, projects, achievements or working relationships come to mind that you were particularly pleased with? Overall, how do you think you have done?

What areas do you believe you need improvement in? What challenges have you encountered that have affected your ability to perform your job? What ideas do you have that will assist you in overcoming these challenges? What do you need to perform your role more effectively, i.e., equipment, resources, training, support, etc.?

REVIEW OF WORK GOALS AND LEARNING OBJECTIVES ESTABLISHED AT PREVIOUS PERFORMANCE REVIEW AND PLAN (IF APPLICABLE)

Using the below chart, please consider and review these goals we set at our last meeting and provide your comments regarding your progress towards these goals.

Previous Goal / Objective Reviewer to complete prior to giving document to employee)	Comments Regarding Results



CARRY FORWARD AND NEW GOALS AND OBJECTIVES

Please list below any carry-forward goals and any new personal work/career goals and/or training objectives that you have, both short-term (1 year or less) and longer term (greater than 1 year). Please include your thoughts and ideas around how these goals can best be accomplished and how you might develop yourself further in these areas. I.e., is there a specific training course you have in mind that you believe will be beneficial to your growth and performance in the workplace, or perhaps coaching or mentoring services? How can I help? *Please list as many goals as you feel are appropriate.*

Goal/objective:	
Achievement plan/targeted completion date:	

Goal/objective:	
Achievement plan/targeted completion date:	

Goal/objective:	
------------------------	--



Achievement plan/targeted completion date:	

Are there any other matters you would like to discuss with me in our upcoming meeting?

I have attached a copy of your most current job description. Please review it carefully, note any duties that may have changed, and we will review this together during our upcoming meeting.