



Writing Self Assessment Statements Based On:
a. Previous Year’s Goal
b. Achievement
c. Job Function

Pat White works as a Financial Analyst in Accounting & Financial Services.

1. Example of a performance goal carried over from the last evaluation period and/or made since the last evaluation period. Focus on the progress made on each goal.

Goals/Achievements/ Job Functions	Demonstrated Competencies	Supporting comments
Learn what data needs to be compiled for the quarterly financial reports and attend the quarterly management meetings where the information would be delivered by more senior financial analyst staff.	Teamwork	By the second quarter, I knew what data needed to be compiled for the quarterly financial reports. I actively participated in the biweekly meetings and I attended the quarterly management meetings. As a result, I learned the key data needed for quarterly financial reports; established working relationships with managers; cross-trained peers in the unit resulting in back-up; and helped two people meet their development goals.

2. Example of a specific achievement and/or deliverable (which may or may not be related to a goal).

Goals/Achievements/ Job Functions	Demonstrated Competencies	Supporting comments
Presentation of financials at quarterly management meetings.	Communication, Problem solving	When two senior staff were ill, I volunteered and stepped in at the last minute to present the financials at the quarterly management meeting. As a result, senior staff received the current financial data as expected, were able to continue with their work and our unit did not get backlogged.

3. Example of specific job function that is listed in Pat’s position description.

Goals/Achievements/ Job Functions	Demonstrated Competencies	Supporting comments
Reconciles monthly ledgers.	Decision making, Quality improvement	In addition to regularly reconciling monthly ledgers, there was a change in the account structure mid-year. I updated the spreadsheets, forwarded the changes to appropriate staff and created a desk guide to assist them. The desk guide made the change much easier and errors were reduced by 70%.