

# Thriving Workplace

## SELF-ASSESSMENT AND SELF-REVIEW WORKSHEETS (Use only those which appeal to you, seem most relevant or useful)

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Recommended articles @ Thriving Workplace associated with this topic:

- [Performance Development Systems Ideals and Ideas](#)
  - [Position Description Ideals and Ideas](#)
- [Statements of Accountability & Performance Agreements](#)

## **Worksheet 1: Self Assessment against a Position Description and/or Statement of Accountability**

This is designed to help you compare your progress, achievements and personal contribution over the past review period (or time since last Performance Appraisal, Assessment or Review), against the objectives and performance criteria agreed in your Statement of Accountability (SOA/Performance Agreement) or intentions announced and recorded within your development plan.

- 1 Locate and read your Position Description.
- 2 Re-visit your development plan. If you lack one, note this as an improvement opportunity.
- 3 Consider the issues, challenges and problems you have encountered in that period.
- 4 Recall examples of your achievements, progress and contributions.
- 5 Consider the impact of training, study, guidance or other support you've had in pursuit of your intentions.
- 6 Think about your plans and what you want for your future.
- 7 If supplied, consider using some or all of the self-assessment tools available from your supervisor or coach.
- 8 If your preparation is for a formal annual (or bi-annual) Performance Appraisal, ask if you are expected to document your self-assessment for your manager and/or your file.
- 9 Consider these questions and make notes of your responses:
  - Which aspects of the SOA have you complied with or fulfilled, and how well?
  - In which have you fallen short of expectations and agreement? How come?
  - Which have been your major accomplishments?
  - What do you consider to be your key strengths and abilities for the job?
  - What changes have there been over the period? How come? What impact have they had?
  - What has facilitated your progress (made it easy)?
  - What has happened to restrict or prevent your progress?
  - To what extent are your values reinforced or challenged by the work?
  - What training or other development support have you taken part in?
  - What have you learned from these events?
  - In what areas do you consider yourself in need of further development or challenge?
  - Which are the aspects of your job you most like and those you like least?
  - What changes would you like to see made to your job to improve your effectiveness or ability to contribute?
  - What degree of your current capacity is being used by this job?
  - How could better use be made of your strengths?
  - How could your manager/s support you to better performance?
  - What are your mid- to long-term plans?
  - What work or which job do you envision yourself doing five years from now?
  - What preparation or support do you need to prepare for that transition?

## Worksheet 2: Generic *Soft Skills* (For *Hard Results*)

<b>Where are your strengths and opportunities for improvement located?<sup>1</sup></b>		
	<b>Personal Competence</b>	<b>Social Competence</b>
<b>Recognition</b>	<p><b><i>Self-Awareness</i></b></p> <ul style="list-style-type: none"> <li>Emotional self-awareness</li> <li>Self-assessment accuracy</li> <li>Self-confidence</li> <li>Metacognition: thinking about own thinking</li> </ul>	<p><b><i>Social Awareness</i></b></p> <ul style="list-style-type: none"> <li>Empathy</li> <li>Treating self and others respectfully, irrespective of differences</li> <li>Sensitivity to others' needs</li> <li>Service orientation</li> <li>Asking questions and posing problems</li> <li>Organisational awareness</li> </ul>
<b>Regulation</b>	<p><b><i>Self-Management</i></b></p> <ul style="list-style-type: none"> <li>Self-control</li> <li>Self-leadership</li> <li>Initiative and risk-taking</li> <li>Learning from mistakes and other experience</li> <li>Thinking with clarity and precision</li> <li>Priority-management</li> <li>Problem solving</li> <li>Responsiveness to change, stress, crises and the unexpected</li> <li>Responsiveness to adversity</li> <li>Trustworthiness</li> <li>Conscientiousness</li> <li>Adaptability</li> <li>Drive for achievement</li> <li>Persistence when solutions to problems are not readily apparent</li> <li>Managing impulsivity/acting methodically</li> <li>Knowing what to do when you don't know what to do</li> <li>Planning and managing own development.</li> </ul>	<p><b><i>Relationship Management</i></b></p> <ul style="list-style-type: none"> <li>Influencing constructively</li> <li>Giving constructive feedback</li> <li>Receiving performance feedback</li> <li>Speaking so that others can easily listen and understand your needs, views, concerns or problems</li> <li>Listening so that others experience themselves as comprehensively heard and understood by you</li> <li>Dealing with and negotiating around differences or conflict fairly and respectfully</li> <li>Responding constructively to others' distress, problems, criticism or hostility</li> <li>Reducing the levels and incidence of destructive conflict</li> <li>Understanding and taking responsibility for your part in the problems experienced with others.</li> <li>Establishing and holding limits/boundaries with other people</li> <li>Building bonds</li> <li>Collaborating and consulting (involving others)</li> <li>Developing and maintaining teams and teamwork</li> <li>Facilitating groups and meetings</li> <li>Supervising</li> <li>Coaching and developing others' performance.</li> </ul>

<sup>1</sup> This framework (and some its content) derived and adapted from the work of Daniel Goleman.

### Worksheet 3: Self Rating of Soft Skills

<b>"Soft" Skills Self-Rating</b>	<b>Importance To Self (1 - 10)</b>	<b>Rating (0 - 5) of current competence</b>
Accuracy in self-assessing		
Self-confidence		
Metacognition – (thinking about own thinking and modifying it while in process)		
Self-control		
Self-leadership		
Initiative and risk-taking		
Learning from mistakes and other experience		
Thinking with clarity and precision		
Priority-management		
Problem solving		
Responsiveness to change, stress, crises and the unexpected		
Responding to adversity		
Trustworthiness		
Conscientiousness		
Adaptability		
Drive for achievement		
Persisting when solutions to problems are not readily apparent		
Managing impulsivity/acting methodically		
Knowing what to do when you don't know what to do		
Planning and managing own development		
Empathy		
Treating self and others respectfully, irrespective of differences		
Sensitivity to others' needs		
Service orientation		
Asking questions and posing problems		
Planning and managing short-term and long-term plans		

<b>"Soft" Skills Self-Rating</b>	<b>Importance To Self (1 - 10)</b>	<b>Rating (0 - 5) of current competence</b>
Influencing constructively		
Giving and receiving constructive feedback		
Speaking so that others can easily listen and understand your needs, views, concerns or problems		
Listening so that others are comprehensively heard and understood		
Dealing with and negotiating around differences or conflict fairly and respectfully		
Responding constructively to others' distress, problems, criticism or hostility		
Reducing the levels and incidence of destructive conflict		
Understanding and taking responsibility for your part in the problems experienced with others		
Establishing and holding limits/boundaries with other people		
Building bonds		
Collaborating and consulting (involving others)		
Developing and maintaining teams and teamwork		
Facilitating groups and meetings		
Supervising		
Coaching and developing others' performance.		

**Notes:**

In respect of each of those identified as both (a) important to you and (b) rating low in your current competence, answer these questions:

- What currently happens (not what does not happen) that causes you to give yourself this rating?
- What will you be doing/how will you be behaving/what practices will you be applying when you reach the next highest point on the scale of current competence?
- What needs to happen for you to rate higher?
- What are the smallest first steps you can take towards that target/those targets?
- What support or information do you need to take them?
- When will you start?
- What do you need to document, within your development plan?

### Worksheet 4:

### Self Rating of Role Competence & Contribution to Desired Organisational Culture

<b>Role Skills Self-Rating</b>	<b>Rating (0 - 5) of current competence</b>	<b>Priority (Top 10) For Development</b>
<b>A: Generic (NB: Add your own, relevant to your position)</b>		
Knowing who are the customers/clients of your own role, within and outside of the organisation		
Maintaining constructive, congenial relationships with customers/clients		
Routinely and methodically involving customers/clients in commenting on the quality of services that your duties require be provided to them.		
Using that information as a basis for improvements to the quality of own work		
Understanding the organisation's values, principles, policies and plans		
Being committed to the organisation's values, principles, policies and plans		
Demonstrating support for the organisation's values, principles, policies and plans		
Developing project plans to achieve aspects of the desired organisational culture		
Maintaining enthusiasm for the organisational culture		
Constructively challenging deviations from the intentions stated for the organisational culture		
Responding constructively to change		
Project planning		
Responding constructively to change		
Limiting the spread of negativity		
<b>B: Specific to Role (NB: These are found within specific Position Descriptions. Those already included here are generic illustrations only. Include your own.)</b>		
Leadership: inspiring others' commitment to strive for shared aspirations		
Planning and managing long-term plans		
Initiating and leading change		
Managing change		

<b>Role Skills Self-Rating</b>	<b>Rating (0 - 5) of current competence</b>	<b>Priority (Top 10) For Development</b>
<b>C: Derived from Organisational Drivers or Other Basis for Defining the Organisational Culture (NB: These are generic illustrations only. Include your own.)</b>		
Taking opportunities to support development of the organisation, whether or not it is directly related to own job		
Taking opportunities to participate in training offered and actively seeking to develop own competencies and skills		
Taking account of the needs of others		
Regularly acknowledging others' work and efforts		
Treating everyone with a respectful manner		
Giving positive constructive feedback as part of the way work is done		
Behaving courteously to others as work is carried out		
Demonstrating sensitivity to the emotional and cultural safety of others		
Actively participating in maintaining a safe and healthy work environment		
Taking an active part in the decision making process		
Taking an interest in what is happening and keeping informed on current issues		
Passing on information that informs and helps others		
Offering help and support willingly to others		

**Notes:**

In respect of each of those identified as your top priorities, answer these questions:

- What currently happens (not what does not happen) that causes you to give yourself this rating?
- What will you be doing/how will you be behaving/what practices will you be applying when you reach the next highest point on the scale of current competence?
- What needs to happen for you to rate higher?
- What are the smallest first steps you can take towards that target/those targets?
- What support or information do you need to take them?
- When will you start?
- What do you need to document, within your development plan?

### **Worksheet 5: Recent Illustrations of Development Needs**

Think of some situation or situations in your recent experience (those in which you were involved in some way) that best illustrate your need for new or enhanced skills, competencies, support, problem-solving or guidance.

Write notes (up to approximately 40 words in each case) describing up to three of these events. If necessary, disguise or avoid naming the other party/parties involved.

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### Worksheet 6: Reflecting on Your Involvement in Significant Change

- How have the changes lived up to or failed your expectations – for you personally, for your role and for those who report to you?
- How well have the changes addressed the needs for which they were initiated?
- What has impeded or facilitated the goals or ideals you held at the start of this change?
- What have been the effects on your stress levels, your wellbeing and health, your personal lives?
- Have the changes brought an increase or a decrease in the quality of your life?
- Which of your competencies have the changes most called for? Which have been found most wanting?
- What opportunities for your growth (brilliantly disguised, perhaps, as other people's difficult behaviours) have been thrown you? How well have you responded to them?
- What are the accomplishments with which you're most pleased? Where have you felt exhilarated or excited?
- Where have you been most stretched or challenged? Where have you felt most despondent or exasperated?
- In what ways have you been best and least supported?
- What have the challenges revealed to you, about you – (on the basis that *adversity doesn't so much build character, as reveal it*)?
- What has the experience revealed to you about your organisation – its structures, values, culture, possibilities, qualities, characteristics, practices?
- In what areas do you consider yourself in need of further development or challenge?
- If you were to summarise the most important, 3 – 5 insights you've had about the organisation (or will have from reflecting on the experience) that your manager or the organisation's leadership should know about, what would they be?
- If you were preparing other people to undertake what you have undertaken over this period, how would you suggest they prepare themselves? Which aspects of that preparation or preparedness did you have for the role?
- If you were to be asked to undertake another change of this magnitude in future, with what insights, learning, understanding and practices would you most want to prepare yourself with?
- How, if at all, has the experience altered your values – or the values that you espouse and would act on if other things didn't get in the way? How well have you been able to act on the values you hold most dear?
- What do you plan to do with what you have learned or are still learning from the experience?

## **Worksheet 7: Twenty Questions for Self-Reflection**

Apply these 20 questions, involving others where relevant, to one or more of (a) your personal practices and primary responsibilities; (b) your work with your staff and/or colleagues; or (c) any wider aspect of your duties or the organisation.<sup>2</sup>

- 1 How would you describe the current health of the part(s) of the organisation for which you are responsible?
- 2 What part of your/our responsibilities are you/we avoiding?
- 3 What interferes with or threatens our/your purpose?
- 4 Which areas of our responsibilities are we most/least satisfied with?
- 5 What gaps exist between what we claim to stand for and how we collectively behave?
- 6 How have we behaved in ways guaranteed to produce the results with which we're unhappy?
- 7 What interferes with or threatens your personal enjoyment of the organisation?
- 8 If we were competing with our organisation, what strategy would be likely to succeed?
- 9 If you were hired to consult to the organisation, what advice would you give?
- 10 What's the most important decision you're facing? What's keeping you from making it?
- 11 If nothing changes, what's likely to happen?
- 12 Of all the matters on which you could put your emphasis for the next 12 months, what is the area which, if improved, would give you and your customers/clients the greatest return on time, energy, and dollars invested?
- 13 What should we be trying to make happen in the next three months?
- 14 What's the most important thing we should be talking about?
- 15 What topic are you hoping others don't bring up?
- 16 What topic do you imagine others are hoping you don't bring up?
- 17 What are you/they/we pretending not to know?
- 18 What things are you doing that you would like to stop doing or find someone else to attend to?
- 19 What do you wish you had more time to attend to at your meetings - With your staff? With your colleagues? With your manager?
- 20 What does it seem impossible to do, that if done would completely change the game? How could you/we pull this off?

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<sup>2</sup> Questions adapted from "*Fierce Conversations: Achieving Success at Work and in Life, One Conversation at a Time*", by Susan Scott.

## **Worksheet 8: Summary of Improvement Opportunities**

To enhance competence in my current role and to release more of my capacity for it, I believe I would be wise to:

### **Keep these behaviours:**

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### **Increase or strengthen these behaviours:**

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### **Stop these behaviours:**

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### **Decrease these behaviours:**

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