

Delivering Effective Performance Reviews

Performance reviews can be one of the most stressful conversations employees and managers will have each year. Following are several tips to help managers make performance reviews less stressful and more productive.

Set the Foundation

Send the Performance Review Form to the employee. Ensure that the employee completes and returns the self-evaluation section of the performance evaluation form, including ratings and comments for each of the six performance criterion in accordance with the established timeline. At the same time, the manager should review their own notes of the employee's performance over the previous year. Once the employee returns their 'self-evaluation' to their manager, the manager should complete their section of the employee performance evaluation form. The manager should then give the completed form back to the employee, one to two days prior to the performance meeting. This will give the employee time to review and prepare for the performance discussion.

Schedule Thoughtfully

Schedule reviews when it is most convenient for the employee – not on Monday mornings or the end of the day. This helps to ensure that the employees will be present and as ready and open as possible.

Plan the Evaluation Carefully

Create a clear agenda for the evaluation. Before delivering the performance review think about the person you are delivering it to and how they will react. Consider how the employee may respond to the evaluation ratings and comments to avoid conversations for which you are not prepared. If you have concerns about delivering the evaluation contact Human Resources for guidance.

Be Transparent

Be open and honest with the employee. It is critical to tell employees what they are doing well and areas where they need to improve. It is common for managers to try to deliver constructive feedback by beating around the bush, i.e., 'sandwiching' a negative comment between two good ones. Be direct in a respectful way; employees value your feedback more when you are being transparent.

Be Specific

When delivering feedback (positive or constructive), be specific and provide examples. For example,

"I think you did a great job running the leadership meeting yesterday. Your agenda clearly showed what topics you wished to cover, with appropriate time allotted for each, and when you broke down the larger group into three small groups and had each problem solve and report out, it demonstrated to me, how well you are able to communicate and encourage teamwork."

“I noticed that you have not been contributing at the past several leadership meetings. You are so insightful when you do contribute. I would love to hear more of your thoughts and reactions. I encourage you to contribute more routinely; I believe it will be well-received by the team.

Each example should acknowledge the situation, the behavior you observed, and the impact you feel it had on others. Include the time and place, and if appropriate ask, “Is that what you were intending? Or hoping for?”

An easy reminder to assure your specificity is SBII: Situation, Behavior, Impact, and Intent.

Point Out the Positives

Identify three positive attributes about the employee and articulate with an example how they demonstrate that attribute. Talk about their initiative to take on new assignments or how well they work with others on the team. If the employee has been with you for the entire year you can identify ways the employee has developed and grown. Feedback on areas of growth can be provided by pointing out their performance in a certain area of their job at the beginning of the evaluation period and how it has improved.

State Areas for Improvement

Before you state your opinion on this, ask the employee how they feel they have grown and in what areas they feel they need to improve. Dialogue with them about that. Agree where you can, with examples, and in an open and direct manner provide employees with the areas of their job that need improvement. Though difficult to hear, constructive feedback is incredibly important. Most importantly, be supportive. If you are able, relate the importance of the improved skill or behavior to their current or next desired role. Demonstrate that you care and want them to be successful. Offer specific ways for the employee to improve.

Allow for Employee Feedback

This may be one of the most important aspects of the evaluation session. Allow employees the opportunity to provide you with feedback and ask you questions about their performance. You can also use this time to ask the employee what you can do better or what the University can do better. Be patient and accessible.

Stand on Convictions

In any organization the vast majority of employees work at the proficient level. Receiving a performance evaluation that is deemed “average” may not be well-received. Explain to the employee that a proficient evaluation means they are meeting expectations and provide them ideas for what they will need to do to exceed a proficient rating. Again, be supportive, but do not change your evaluation unless the employee provides a compelling argument that is documented in facts and not emotions.