

Participating in Performance Reviews

*Preparing for and Participating in
(Relatively) Stress-free Review Meetings*



http://www.youtube.com/watch?v=09bp_4Muh8

THE PROBLEM WITH REVIEWS ACCORDING to Employees



But, you can impact your experience . . .

- **Never get one or it's late.**
- **General comments and no examples.**
- **No guidance about what to do differently.**
- **Weak link between performance and pay.**
- **Feel like I'm being "graded."**

- **Do your self-assessment before the due date.**
- **Provide multiple relevant examples for each item.**
- **Ask. Be prepared to say what you will do differently.**
- **Ask what you can do to get a higher rating.**

Plan - Prepare - Participate

Session Objectives



Overall:

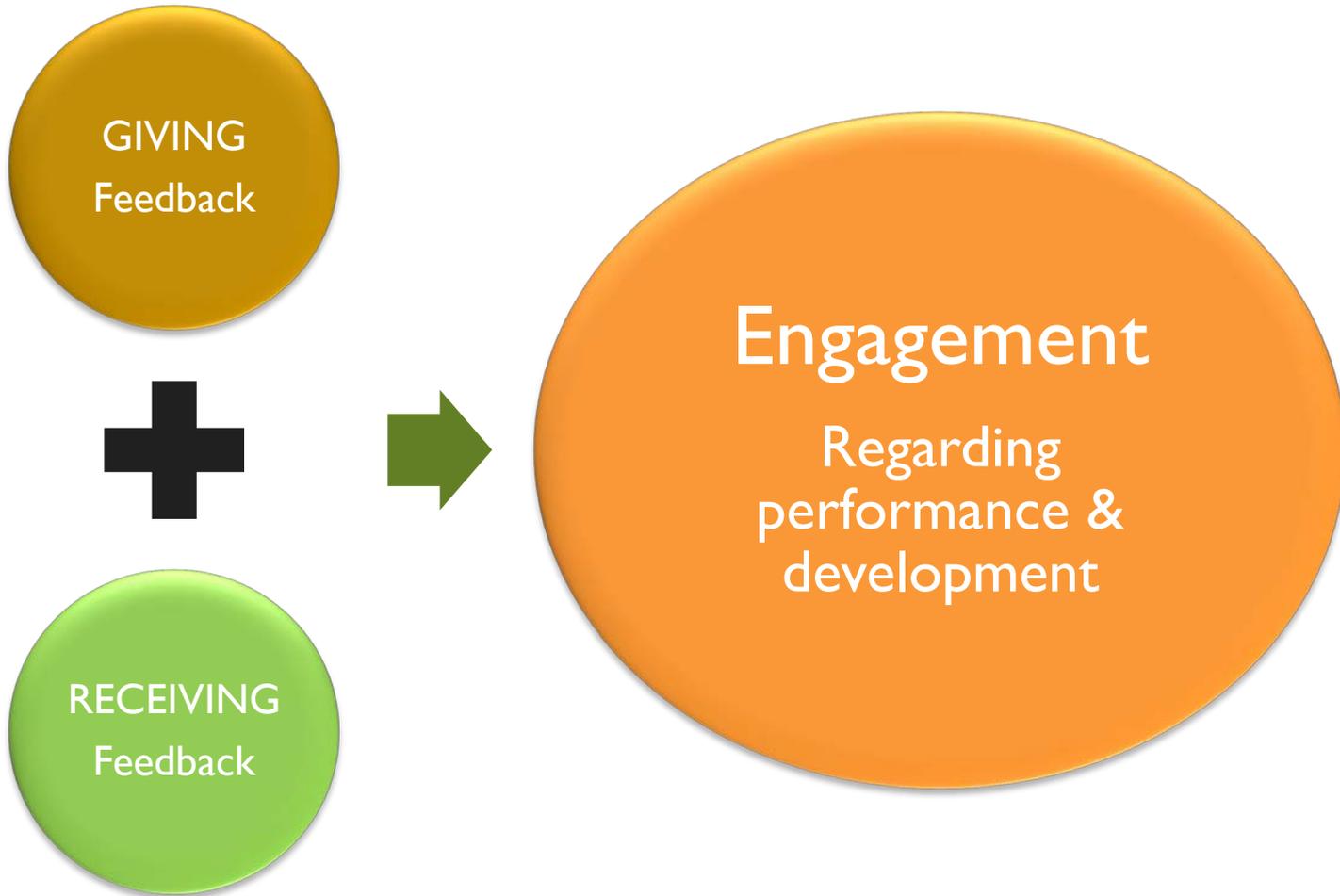
To prepare you to participate actively in the Performance Review Discussion.

Learn how to explain your view of your performance.

Identify the important questions to ask during the review.

Plan how to handle any awkward moments that may arise

Purpose of Performance Reviews



WIIFM? (“What’s In It for Me?”)

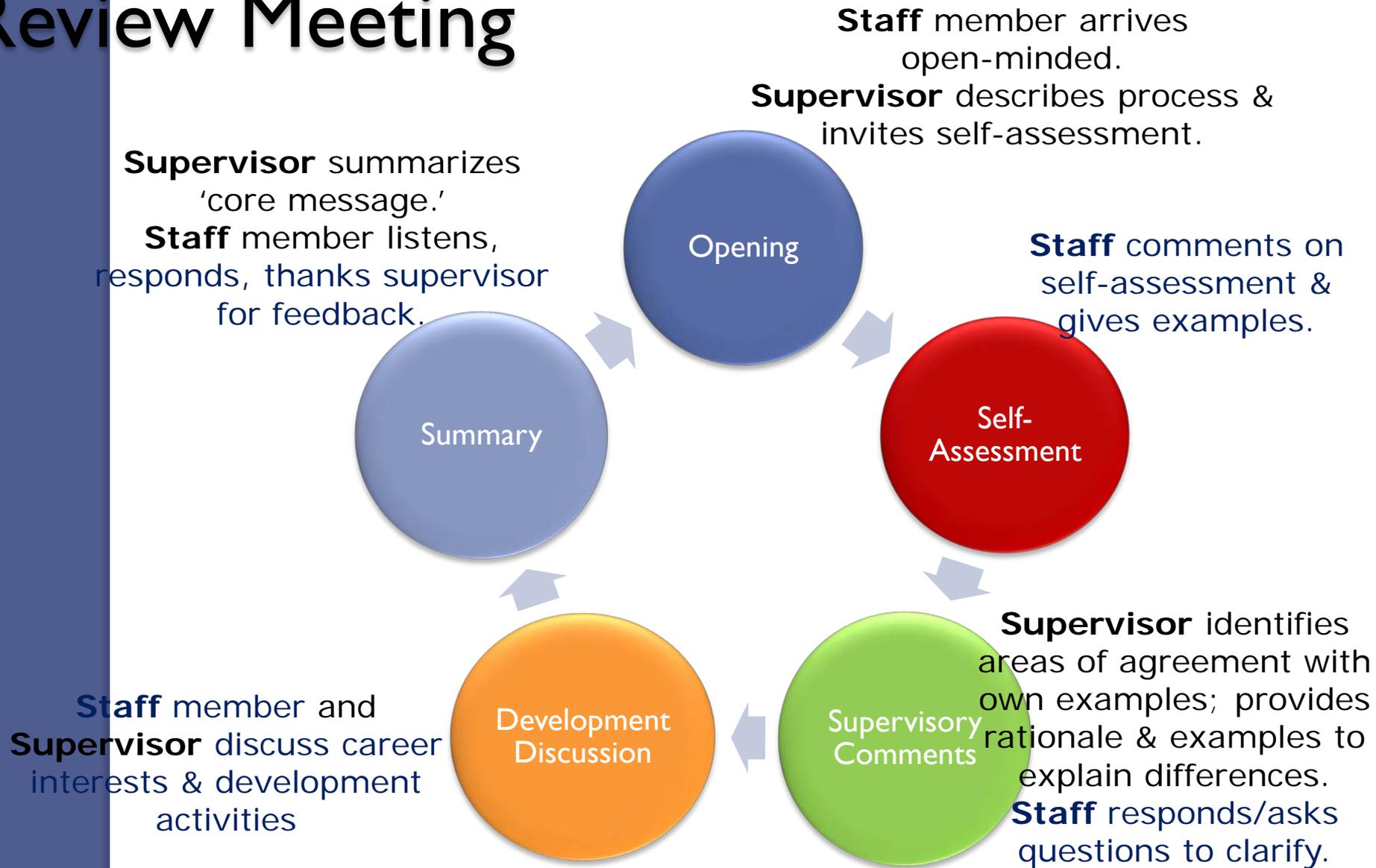
- Opportunity to **influence** how you are perceived.
- Chance to clearly understand how your performance is perceived by others.
- Let your supervisor know what you need in order to perform at your best and be successful.
- Build on the positives and know exactly what you should continue doing
- *Accountability* – Assessing your own performance is part of doing your job!

Accountability

Takes Responsibility and Ownership for Decisions, Actions and Results.

Valued	Top
Accountable for <i>how</i> and <i>what</i> results are achieved	Plans and seeks out resources
Recognizes and admits mistakes and takes action to correct	Sets targets for self
Monitors process, progress and results for self	Shares information freely with supervisor and peers
Gives honest and timely feedback	Challenges self and others to increase results and improve

Review Meeting



Typical Agenda for Review Meeting

- *Pre-arranged scheduled time (15-60 minutes)*
- *Private, uninterrupted location.*

- Opening: Supervisor explains purpose and the process.
- **Self-Assessment**
 - Describe quantifiable results or examples for each goal/expectation.
 - Be prepared to talk about one or two achievements that you are most proud of.
 - And, “What I learned this year.”
- Supervisor’s Appraisal
 - Explains each rating & provides examples.
 - Invites questions.
 - Employee asks for examples if none were provided or asks if there are areas that s/he should focus on more or do differently.
 - Reviews development actions and asks about career plans.
 - Employee describes what s/he would like to learn or do during the next year and suggests how to make it happen.
- Summary & Core Message
 - Employee makes a positive statement summarizing his/her view of own performance over the last year, lessons learned, what s/he appreciated about the supervisor’s support.
 - Supervisor concludes with Core Message.

Plan & Prepare: Data & Examples

**The
NOTEBOOK**

- **Goals/Expectations**

- Factual quality-quantity-date information that directly supports the level of attainment.
- Description of specific related activities; references to a work sample, project, incident.

- **University Values**

- Specific examples that show obvious connection to each Value.
- Incorporate phrases from Appraisal Wizard (available at Year-End) along with a specific incident involving you.

APPRAISAL WIZARD

- **Overall Comments**

- General summary regarding the level of performance.
- Reiteration of key positive highlights/ progress achieved.
- Create your own Core Message (i.e., your performance 'legacy')

Prepare: General Questions

- What was my greatest strength this past year? Where did I contribute the most/make the most difference?
- What would you like me to do differently? Is there anything I should do differently?
- What should I keep doing?
- What do I need to learn in order to (move ahead/be eligible for more pay/____)?
- What would you like me to focus on this upcoming year?
- What could I do to improve my performance?

Participate: Speak Up!

- Introduction: Start on a positive note!
- Briefly explain your overall assessment of the item and provide relevant example(s).
- Observe. Pause & allow silence if you note a reaction. Say, “I don’t know how you viewed this/think about it...”
- Move efficiently through the items in a conversational tone.

(Typically, you will either go through all items on the review first as your self-assessment and then your supervisor does the same OR

You and your supervisor will take turns and jointly discuss each item before moving onto the next.)

Awkward Moments

Disagreement

Too General

Negative

Surprises

Supervisor Talks Too Much

DO'S & DON'TS FOR AWKWARD MOMENTS

- Do keep your cool.
- Do remain professional at all times.
- Do listen first before responding.
- Do ask questions.

- Don't show a defensive attitude.
- Don't react emotionally.
- Don't shut down and get silent.
- Don't just give up and adopt a "it doesn't matter thinking;" view it as a longer term investment in your own career/development.

How to Receive Feedback

- Listen and seek to understand
- Assume good intent
- Evaluate the feedback
- Pause, breathe (SAD)
- Ask questions
 - Use “I” statements
 - Ask for detail
 - Maintain emotional control



Responses for Awkward Moments

- What specific examples/situations are you referring to that cause you to say that?
- May I have a moment to share my examples?
- I was not aware of that issue. What should I be doing instead? How will I know if I'm improving?
- What is going well with my performance?
- I'd like talk about this some more.
- Help me understand specifically what I should be doing differently to be considered (Valued, Top) in the area of _____.

Always respond in a professional, respectful manner!

Summary: Parting Words!



REMEMBER THIS!

People usually remember **how** you behaved vs. **what** you actually said.



However, plan your **SUMMARY** to convey:

- ✓ Your intent to continue (improve) your level of performance.
- ✓ Your appreciation for your supervisor's support during the year.
- ✓ Thanks to your supervisor for their time and effort in preparing the review and meeting with you.