Writing Performance Reviews

Why?

What?

How?

THE PROBLEM WITH REVIEWS

According to Supervisors...
- Take too long to write.
- People only want good news.
- It’s about “Show me the money!”
- Don’t improve performance.

Employees say...
- “I don’t know what to say. Don’t want to sound like I’m bragging.”
- “My supervisor hates to do them.”
- Same old stuff. No examples.
- No guidance about what to do differently.
- “It doesn’t make a difference in my pay.”

Effective feedback about performance = 25% increase in performance!

Five Drivers of Employee Engagement

- Informal Feedback
- Accurate Performance Review
- Employee Development Activities
- Clear Goals
- Managing Change Effectively

Source: Corporate Leadership Council

WHY?

- Identifies results and compares to expectations set at beginning of year.
- Highlights achievements.
- Generates documentation and a record (+ and -).
- Translates/summarizes informal feedback into formal written feedback and prepares for dialogue.
- Provides justification for employment decisions.

Written reviews reinforce:
- What is expected of me?
- Why is this important?
- How am I doing?
“Writing it down makes it matter.”

Informal Feedback
- Feedback based on supervisor’s observations enable incremental changes & development
- “Real-time” here-and-now for greatest impact
- Builds relationship bank account over time

Formal Feedback
- Documented record of past results
- “History” to evaluate
- Dedicated time to discuss
- Looks back over time and sets plan going forward

Rater Biases: How to Limit the Effect

“The facts, ma’am. Just the facts.”
- Contrast/Comparison
- Central Tendency
- Familiarity/Similarity
- Halo/Horns Effect
- Recency
- Length of Service
- Prior Reviews

Documentation Guidelines

“What?”
- Keep a record of examples & samples.
- Note successes and lessons learned.
- Document as events occur.
- Note dates, times, objective measures.
- Include important items, not every routine action.
- Endeavor “Notes” Tool: copy/paste emails, portions of electronic documents, sample work

You have the opportunity to influence your review by what you choose to write and how you write it!

General Writing Tips – ”What?”
- Provide specific examples or quantitative, measurable information to demonstrate progress compared to a target.
- Do not over-focus on improvement needs.
- If improvement is needed, do more than describe the need. Describe what can be done to improve the specific result or behavior.
- Give more examples of important information to justify a TOP rating or for REQUIRES IMPROVEMENT rating.
- Use different examples for each goal/expectation/University value.
- Keep your comments descriptive and succinct. (Focus on facts & measures. No generalities, labeling or personality traits.)
- Use correct grammar, punctuation, spelling. OR, a bulleted list of accomplishments if there are several instead of a narrative paragraph.
Writing Tips – What?

Goals/Expectations
- Objective quality-quantity-date data that directly supports the level of attainment. (Factual data based on metrics)
- Description of specific related activities; references to a work sample, project, incident.

University Values
- Specific examples that show obvious connection to each competency.
- Incorporate phrases from Appraisal Wizard along with a specific incident involving you.

Summary Comments
- General summary regarding the level of performance over time period.
- Reiteration of key positive highlights/progress achieved.

SAY WHAT?!?!?

“This young lady has delusions of adequacy.”
“Works well when under constant supervision and cornered like a rat in a trap.”
“He brings a lot of joy whenever he leaves the room.”
“Got a full six-pack but lacks the plastic thing to hold it all together.”

HOW you say it can be as important as WHAT you say. . .

WRITING TIPS “Just the Facts”

Vague Opinion
- Organized and efficient in performing daily tasks in a timely manner.

Specific Facts
- Utilized a “5 Top Priorities” list to plan daily tasks and accomplished all assignments on or before requested deadlines.
- In January reorganized electronic folders by project areas and saved in department folder which enabled project teams to locate specific project information independently and efficiently.

OR. . .

Specific Metrics & Examples

- Improved quality & satisfaction of learning programs in 2011.
- Increased 2011 program fill-rate to 95% vs. average of 77% in 2010. Average overall rating increased from 8.3 to 9.2.

- Received excellent patron feedback on Fall performance series.
- Consistently increased patron satisfaction ratings from Winter (7.2) to Spring (7.9) to Fall (9.1) by implementing patron suggestions noted on prior evaluations re: ticketing, intermissions, and event communications.
WRITING TIPS  “Straight Talk”

Negative Tone
- Constantly fails to double-check orders against customer request form resulting in inaccurate or partially executed orders which causes customer complaints and re-orders at last minute.

Instructive Tone
- Needs to read all information on request form & obtain customer confirmation of plan. Review request form against actual order twice before sending order to event location.

Specific Examples That Lead to Improvement
- Joe needs to plan ahead better to avoid last minute confusion that causes stress for the rest of the team.
- Earlier planning of activities with affected team members will reduce stress on the team and increase the effectiveness of the event.
- Needs to be better organized and learn how to multi-task when filling in at Help Desk.
- Following department procedures for completing call tickets and batching paperwork prior to input will increase efficiency. Getting more familiar with the database search features and various resources will help Terry provide information more quickly to callers.

PERFORMANCE LEVELS

- **TOP**
  - Exceeds expectations in most aspects of the job frequently.
  - Goes above and beyond what is asked.
  - Thinks ahead, is proactive. Seeks improvement.
  - Solves problems independently.

- **VALUED**
  - Meets expectations in all major aspects of the position and exceeds some.
  - Sometimes goes beyond what is asked.
  - Takes initiative to solve problems.
  - Seeks learning and improvement.

- **DEVELOPING**
  - New to the position or some duties are new.
  - More training/learning is needed to be fully performing all aspects of the job at the desired level.
  - Performance does not meet expectations for fully experienced person.

End with an accurate and optimistic CORE MESSAGE

- **REMEMBER THIS!**
  - People rarely remember what they are told.
  - What they remember usually wrong.

  The more specific the facts, examples and future suggestions, the more likely it will result in mutual agreement about performance expectations, execution and results.

**CORE MESSAGE = SUMMARY**
Overview of positive efforts or accomplishments over the covered period. One or two key messages that they will remember about their performance.