Performance Evaluations

NOVEMBER 10, 2017

Agenda
1. Introductions
2. Community agreements
3. Performance evaluation process
   a) Self-evaluation
   b) Performance conversations
   c) Getting feedback
   d) Overall performance rating
4. Goal-setting
5. Resources
Introductions

- Name
- Role/Title
- Department/Center
- How long you’ve been a supervisor
- How many people you supervise

Community Agreements

- We are colleagues.
- We will maintain confidentiality.
  - No names
  - Discussions stay here
- Others?
Opening Thought

One of the most tried-and-true forms of management is feedback.

Dr. Christopher Lee

Steps in Performance Management

• Define the work
• Goal-setting
• Feedback
• Evaluation
Performance Evaluation

“Wow, I’m so excited for my performance appraisal today!”
Said no one ever.

www.KevinKruse.com

Performance Evaluation Pitfalls
Performance Evaluation Pitfalls

“I don’t have time to write performance reviews, so I’ll just criticize you in public from time to time.”

“Did you happen to see that little note I left about your evaluation?”

Performance Evaluation Process

- Employee self-evaluation (strongly recommended)
- Supervisor collects feedback (optional)
- Supervisor evaluates and comments (required)
- Performance conversation (required)
- Employee final comments (optional)
- Both parties sign (required)
Self-Evaluation

Allows the staff member to:

- Summarize their accomplishments
- Identify challenges/concerns
- Identify areas for growth and development

**Template available – Handout**
https://www.engineering.uiowa.edu/college/faculty-and-staff/engineering-human-resources

Getting Feedback

**Timing:** Supervisor can request feedback at any time after the evaluation has been initiated.

**Best practices:**

- Talk with employee about how you will use it.
- Ask for employee input about who will be invited to provide feedback.
- Be specific in the type of feedback you request.
- Set a deadline for response.
- Summarize feedback received in your own words.
- Use feedback for *development* rather than *evaluation*.
Feedback Request Example

*Please comment on Julie’s performance over the past year. I would appreciate examples of both good and poor performance.*

👍 👎

Feedback Request Example

*Please describe your personal observations of Julie’s strengths and weaknesses related to her interactions with students in the advising process. Please provide specific examples to illustrate your comments. I would appreciate receiving your response by February 15, 2018.*

👍 👎
Break

Take 5!

I'd like you more
If you were more
Like ME

The Performance Conversation
The Performance Conversations

- Focus on development – role and professional/career
- Explore and leverage strengths
- Set aside comparison and bias
Addressing the Hard Stuff

Getting it rolling
"I want to talk to you about (category of performance)."

Things from my perch
"I've observed (describe the performance or behavior)."

Outcome
"The impact is (describe the impact on the job being done)."

Getting curious
“Tell me about more about what’s going on.”

Request/invitation
"From now on, I'd like you to (describe how to improve performance/behavior)."

Overall Performance Ratings

“Time for your annual performance rating.
Fenwick, take one step forward.”
Overall Performance Ratings

- **Outstanding**
  - Consistently surpassed expectations/goals in all areas; unique and exceptional accomplishments; excelled beyond peer group.

- **Exceeds Expectations**
  - Surpassed expectations/goals in some areas; unique understanding of work well beyond minimum job requirements.

- **Successfully Meets Expectations**
  - Met expectations; reliable in attaining expected results; work completed on time with accuracy.

- **Needs Improvement**
  - Did not meet expectations in some areas; results were inconsistent.

- **Unsatisfactory**
  - Must show immediate and significant improvement in order to continue employment.

Goal-Setting

- **There are 2 types! Really!**
- **Goals can be ‘fluid’**
- **Goals matter**
Goal-Attaining

- Schedule ongoing updates
- Continually assess for clarity
- What matters gets measured

Steps in Performance Management

- Define the work
- Goal-setting
- Feedback
- Evaluation
Questions/Round table discussion

Resources

- Performance Review Overview
  - https://hr.uiowa.edu/performance-management/performance-review
- MyQuickCoach
  - Making Performance Reviews More Useful, Jason Womack
  - Conducting More Effective Performance Reviews, Dr. Judith Segal
  - Improving Employee Performance, Roger Herman
  - Purpose and Increased Performance, Dr. Iris Firstenberg
- Employee Performance Review – An Easy How-To Guide, by Shari Harley
  - https://www.youtube.com/watch?v=axUYxKC2U04 (15 minutes)
Closing Thought

To be effective and yield results for your business, performance management must be a year-round process with no end.

Teala Wilson

Thank you for attending!

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