

Performance Evaluation Procedures & Tips

DISCUSSING PERFORMANCE

An important part of the performance review process is a meeting between the manager and professional staff member to discuss the review. The manager should provide the professional staff member with a copy of his or her evaluation before the meeting so they can review it prior to the discussion. Then, in the meeting:

1. Review Performance Goals, Core Competencies and Effective Workplace Competencies.
2. Discuss themes and overall performance rating.
3. Address career development and opportunities.
4. Ask and answer questions about expectations.

PREPARING FOR CHALLENGING PERFORMANCE CONVERSATIONS

A manager should consult with Human Resources as soon as a performance issue is known.

Prepare in advance:

- Talking points
- A document to give the staff member.

Be mindful of how you want to discuss the performance issue.

- Be careful of providing excuses, such as "probably just as much our fault as yours."
- Be careful of words that may sound like proxies for bias, such as "not committed" or "too rigid" (of course, make sure no bias!)
- Avoid absolutes, such as "always" or "never".
- Avoid hedge words, such as "it appears".

During the meeting:

- Acknowledge up front that this is going to be a serious conversation – consider giving employee a few minutes to review first.
- Focus on themes initially and then give specific examples to support them.
- Discuss any disconnects between your evaluation and the staff member's self-evaluation (formal or informal).
- Don't argue over the details of a specific incident – instead refocus on big picture/pattern.
- Don't impugn intent, such as "not trying" or "don't care" – focus on outcomes or describable behavior.
- Don't inquire or speculate as to the "why" for the performance deficiency, such as physical or emotional conditional or work-life management.
- Give the staff member an opportunity to talk.
- Listen
- Make clear expectations going forward.
- Discuss specific check-ins & a monitoring period
- Make clear that, while you want to help the staff member succeed, the staff member is responsible for making the necessary improvement.

After the meeting:

- Ask staff member what you can do to support them in making the necessary improvement.
- Follow-up – as promised or more often if necessary.
- Treat staff member with dignity and respect.