

GUIDE FOR MANAGERS: THE PERFORMANCE APPRAISAL

PREPARE FOR THE ANNUAL PERFORMANCE EVALUATION:

- ✚ Clarify expectations for the employee (a job description with a listing of duties and responsibilities).
- ✚ Make the employee aware of performance standards, objectives, expectations and specific areas of accountability.
- ✚ Review actual work performance in relation to the performance plan, objectives and outcomes.
- ✚ Provide ongoing feedback on performance. Performance should be a normal part of the day-to-day relationship between a supervisor and employee. If an employee is given ongoing feedback, then the annual appraisal should contain no surprises.
- ✚ As soon as a performance problem is observed, openly problem-solve with the employee to try to determine the cause of the problem and corrective action.
- ✚ Keep a regular record of all unusual behavior.

PERFORMANCE REVIEW MEETING:

- ✚ Complete a draft of the Performance Appraisal Form or Narrative Form.
- ✚ Encourage the employee to prepare for the meeting.
- ✚ Both the evaluating supervisor and the employee should understand the purpose of the appraisal process.
- ✚ Schedule the appraisal meeting several days in advance.
- ✚ Put the employee at ease at the beginning of the appraisal meeting.
- ✚ Allow the employee to engage in self-evaluation.

- ✚ Review the written appraisal with the employee, stating both standards and/or objectives met or not met.
- ✚ Emphasize work behaviors rather than personal traits.
- ✚ Provide positive feedback as well as negative feedback.
- ✚ Use specific examples to illustrate employee's accomplishments.
- ✚ Ask probing questions to seek clarification of misunderstandings or views that differ. This gives the employee an opportunity to discuss items of interest or concern.
- ✚ Allow the employee to summarize the interview in his or her own words.
- ✚ Work with the employee on a developmental plan.
- ✚ Close the performance review meeting:
 - ❖ Summarize the key issues that were discussed and seek agreement and/or clarification.
 - ❖ Give positive feedback to the employee for his/her active participation in the review meeting.
 - ❖ Reinforce your commitment and the employee's commitment to future plans, as discussed.
 - ❖ Explain the next step in the performance process.
 - ❖ End the meeting in a positive, friendly manner.