

# Guide to Conducting a Successful Performance Evaluation

## Before the Performance Evaluation:

Although Performance Evaluations are conducted annually, it is good practice to provide the employee feedback regarding their performance throughout the year. The evaluation is intended to be the last task in what should be an ongoing, year-round process of managing performance.

Two-way communication between employees and supervisors is critical to everyone's success. Providing feedback and candidly addressing concerns can build a more productive work environment. An open dialogue can help clear the air and pave the way for an effective performance evaluation with no hard feelings and a clearer perspective on expectations.

Nothing contained in the Performance Evaluation should be a surprise; it should not be the first time an employee hears about an issue.

## Conducting the Performance Evaluation:

Set aside time to complete the evaluation in advance.

Utilize the Position Description and your supervisory file and other information you have been gathering over the previous year when completing the form.

- Position Descriptions (PDs) are an essential part of the Annual Evaluation process. PDs should be reviewed for accuracy and revised if there are inaccuracies or changes needed.
- Do not let inaccuracies with a PD delay the completion of the Annual Evaluation. Base the responsibilities on what you know are the current duties of the job.
- Refer to your notes from your regular status meetings, project updates, discipline documentation, IDPs, and goal check-ins.
- Summarize E-mails, thank-you notes, student and colleague comments, and other documents as appropriate.

Give real thought to your responses, utilize the results and summary sections and provide behavioral and measurable outcomes.

Be fair and objective in completing the evaluation and base your responses on the performance over the entire past year.

## Meeting with the Employee:

Schedule a time in advance, in a quiet and private location, to meet with the employee and go over the evaluation.

Outline your goals for the evaluation.

Do not be afraid to let the employee know about areas where there is a need for improvement. Keep your feedback constructive. Avoid making generalizations about the employee's personality or attitude, and stick to facts and behaviors.

Remember:

- Even if you and an employee disagree on a point you can both express your opinions, but you are the supervisor and your evaluation is the final statement.
- Make sure you have clear and consistent expectations for all your employees, based on performance on the job, too avoid perceptions of bias or unfair evaluations based on personality or protected class designation.

## Completing the Process:

- Sign the Evaluation as the 'Rater.'
- Set a timeframe for allowing the employee to comment and secure the employee's signature. Provide a copy of the Evaluation to the employee.
  - Please note: An employee is not obligated to sign the Annual Review. Signing does not indicate acceptance or rejection of the evaluation.
- Keep a copy for your files.
- Secure your supervisor's signature.
- Submit the Evaluation to the Human Resources Office by the deadline provided.