

Business Operations

Instructions for Completing Performance Feedback & Evaluation

Preparation

- Review documentation (notes, letters, files) before working on each review.
- Review the *definition*, *key words* and *list of descriptors* when evaluating each competency, e.g. Quality of Work (Note: all descriptors will not apply to every position).
- Review rating scale and definitions; be consistent in evaluation of all employees.

Completing Performance Review Instrument

- List employee's goals for performance evaluation period, indicating progress made toward goal completion.
- Refer to the *Performance Feedback & Evaluation Worksheet* and:
 - Circle the number associated with each descriptor for which you will be evaluating the individual. All descriptors will not apply to every position and space is provided to add descriptors not listed. (NOTE: the same descriptors should be used to evaluate employees in the same position/classification in order to be as consistent and objective as possible.)
 - Select one rating (1-5) for each descriptor.
 - Determine total rating for each core competency. (Total of the rating column divided by the number of descriptors rated.) Round up (.5-.9) or down (.1-.4) to the nearest whole number.
 - Check appropriate core competency rating on Performance Feedback & Evaluation Form.
- Statements supporting your rating of each core competency area are needed; these statements indicate the method used to validate the evaluation rating and can include constructive feedback and/or compliments. Attach additional sheets if necessary.
- Evaluator must include goals/action plan if employee receives a '1' or '2' on any core competency.
- *Leadership* core competency is completed for those with supervisory responsibility.
- Select overall rating using based on the criteria listed.
- Identify goals for next year (mandatory).

The Performance Review Meeting

- Schedule ample time and a private place for the discussion.
- Minimize interruptions during the meeting.
- Review employee's position description; if duties have changed, make appropriate changes and submit to Business Operations HR.
- Begin the discussion on a positive note, e.g. use employee's accomplishments and progress on goals to begin the meeting.
- Make sure individual goals are in alignment with department goals; communicate to employee.
- Be clear about performance standards within your unit.
- Use language that is clear and specific when describing performance of each core competency; use examples.
- Describe performance, not personality.
- Actively listen to your employee; encourage participation.
- Allow employee to speak freely before responding to his/her comments.
- Set goals to: 1) improve performance in targeted areas; 2) build on strengths; 3) develop the employee's knowledge, skills and abilities; and 4) align the employee's work with the needs of the unit.
- Agree to follow-up if necessary.

Closing the Performance Review Process

- End on a positive note by summarizing employee's strengths and contributions.
- Offer help and support.
- Make sure that the supervisor and employee have signed and dated the performance review instrument.
- Return all reviews to Business Operations HR by August 31, 2005; the current review period is May 1, 2004—June 30, 2005.
- Original performance reviews are forwarded to Business Operations; supervisors should make copies for employees and supervisor files.