

PERFORMANCE REVIEW

PERFORMANCE REVIEWS

Performance reviews should be done a minimum of semi-annually.

Performance appraisal is an essential tool to use to evaluate employees so they know what is expected of them. It offers many benefits to employees and it helps them:

1. Set Goals.
2. Receive fair and objective information on how they are performing.
3. Take responsibility for their performance and progress.
4. Receive recognition for accomplishments.
5. Get the help and direction they need to improve performance.
6. Identify and overcome performance and behavior problems.

A performance appraisal should motivate an employee to want to improve. If employees are only told about their failures and weaknesses, they will start to believe they can't succeed.

DOCUMENTATION

Documentation plays a significant role in performance appraisal. Keeping written records ensures that you and your employees share an understanding of goals, measurements, and improvement plans.

To define performance, the supervisor and the employee should review the job's requirements as described in the job description and agree on performance goals related to those job duties.

The supervisor should keep notes on examples of results or efforts of the employee throughout the year. This helps the supervisor remember specifics when writing the performance appraisal.

ANNUAL PERFORMANCE REVIEW

Annual reviews should be done on the anniversary date of the employee or on an annual review date set by the company.

1. The employee's immediate supervisor should ask for input from all team members who interact on a regular basis with the employee including other supervisors and managers.
2. Employees can complete a written review evaluating themselves prior to the review meeting. This is optional, but it establishes better communication between you and the employee and makes for a more productive review meeting.
3. The supervisor should review goals and expectations and any progress made in meeting those goals.
4. The supervisor compiles the information and completes a review form. After completing the written performance evaluation form, the supervisor should read it carefully checking for the following:
 - Does it focus on goals and job performance?
 - Is it fair and objective?
 - Does it reflect any personal biases or stereotypes?
 - Does it focus too much on a single or recent incident?
 - What specific improvement goals might be proposed?
5. The supervisor sets up a "Review Meeting" with the employee, making sure it is held in a comfortable and private setting.

ANNUAL PERFORMANCE REVIEW MEETING

Briefly review the employee's performance since the last review meeting. This may include examples of:

1. Strengths and accomplishments related to the last period's goals.
2. Where more improvement is desirable.
3. Performance shortfalls.
4. Problems caused by people or situations beyond the employee's control.

The next step in the review meeting is to set goals. They may be the same or new, as long as there is agreement that they are essential to the employee's success and productivity on the job.

The supervisor should establish an action plan, measurements, and a timetable for achieving the goals. Also, identify and resources (training, coaching, equipment, etc.) that can help the employee achieve the goals.

Looking positively toward the future is the best way to end a performance appraisal meeting. The employee is more likely to leave feeling motivated to work hard and improve.

RECOGNIZING OUTSTANDING PERFORMANCE

Everyone needs and deserves credit for meeting and exceeding goals. Top performers should receive verbal credit from their supervisor for every single outstanding accomplishment. They also deserve more tangible rewards. Raises and bonuses are, of course, desirable. But if budgets don't permit it, supervisors need to find other rewards that will have meaning to the specific employees. For example, time-off, state-of-the-art equipment, write-ups in the company newsletter, etc.

DEALING WITH UNSTABLE EMPLOYEES

Performance appraisals can sometimes generate emotional reactions. In any performance review discussion, it is best practice to:

- Focus on behavior, not personality
- Give objective examples
- Avoid attacks
- Give the employee a chance to respond
- Listen fully to the employee's point of view

Keep the process fair and objective and give credit for achievements, identify areas for improvement and work together for the good of the employee and your company.

DEALING WITH POOR PERFORMANCE OR BEHAVIOR

It is best to act immediately when you see a performance problem waiting for the next performance appraisal period is not a good idea. Tell the employee what he or she needs to do to improve ASAP when they make a mistake.

On rare occasions, an employee will not be able to meet performance goals. In those instances, the performance review process objectively identifies a need for disciplinary action or termination.

You should not take disciplinary steps or termination lightly. Consult with Human Resources prior to terminating any employee.

Performance appraisals should provide direction, guidance, and motivation for your employees to succeed.