



## Performance Reviews and Evaluations

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HR Risk Manager

- Bachelor of Science in Psychology
- SHRM-CP, CIWCS, CPHR
- Specialty Credentials
  - Mental Health Ally Certification
  - Disabilities at work Certification
  - Veterans at Work Certification

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Foundation for a good review program

- Purpose
- Training
- Communication Plan
- Prepare Reviews
- Accountability
- Pitfalls to Avoid




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Why should I do performance reviews?

**Employees have a right to know how they are measured, and how to be successful.**

- How did they deliver on your expectations
- Describe and explain



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### What is the purpose of a Performance Review?

It is a conversation about historical performance.

What will the information be used for?

Promotions

Pay Increases

Communication

- *no new information*



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### Training

- Instrument
  - What will employees be rated on
  - Skills, behaviors, achievements
- Define terms & ratings
- Writing
  - Review the job description
  - Highlight improvement
  - Avoid bias
  - Use neutral language
  - Be comprehensive
- Review before delivery



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## Communication Plan for Employees must be before the review period

### What should be communicated

- Review period (i.e. Jan 1 through Dec. 31)
- When employees will receive their review (March of the following year)
- Purpose – what will the review be used for
- Instrument – explain what they will be rated on
- How they can achieve each rating (teach to the test)
- What each rating means and the difference between ratings

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## Preparing Evaluations

- Set deadlines
- Gather data
- Write evaluations
- Calibrate with peers
- Edit
- Review
- Deliver

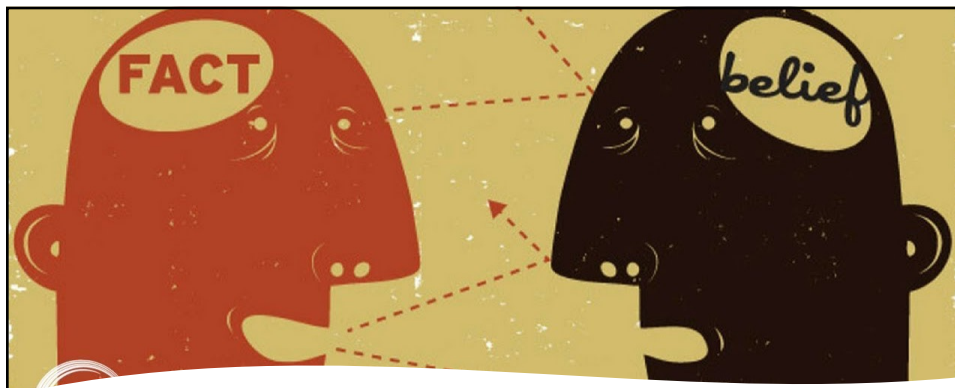
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## Gather Employee Data and Examples

- Coaching Notes
- Recognition
- Feedback
  - Peers
  - co-workers
  - stakeholders
- PIP and Discipline
- SMART
- Attendance



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### Types of Supervisor Bias

- Recency
- Horns/Halo
- Central Tendency
- Leniency
- Like me
- Confirmation (Bad Apple)
- Gender



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COLLABORATION  
DELIVER **INNOVATE** INSPIRE **VISION** MOTIVATION **PERFORMANCE**

# ACCOUNTABILITY

SERVICE INTEGRITY ACCESS **TEAMWORK** DUTY **STRENGTH** RAGE FOR **EXCELLENCE** RESPECT

Set deadlines for supervisors and managers with meaningful consequences.

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## Pitfalls to Avoid with Performance Evaluations

- Avoid any information that is new or a surprise
- Don't spring reviews on employees after the fact
- They are not disciplinary action
- They are not Performance Improvement Plans (PIP)
- They are not goal setting
- They should be accurate and factual
- They should be balanced
- They should not include any protected information
- They must be consistent with other accountability conversations

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