Conducting the Evaluation Meeting - Guidelines

When conducting the performance evaluation review, consider the following:

1. Put the employee at ease:
* Provide a private, comfortable atmosphere conducive to conversation; there should be no interruptions during the meeting.
* A desk can sometimes be a barrier to communication so consider a less formal physical setting.
* Start the review on a positive note; be friendly, sincere.
* Stress the desire for two-way communication.
1. Indicate the purpose of the meeting:
* Communicate that the primary purpose of the meeting is to review the employee’s work performance and discuss achievements and opportunities for improvement.
* Review the employee’s performance using feedback from the employee and a draft version of the performance evaluation form.
* Provide the employee with an opportunity to express feelings, ideas, and concerns.
* Discuss any anticipated changes in responsibilities.
* Discuss performance expectations.
* Determine any training and development needs and how to meet them.
* Agree on mutual goals and objectives for the next review period.
1. Obtain the employee’s views:
* Employees may be aware of job accomplishments that you have overlooked.
* Be aware of extenuating circumstances that may support changing your evaluation.
* It is important to obtain the employee’s ideas regarding ways in which performance can be improved.
* Two-way communication helps clarify information and creates a mutual understanding between the supervisor and employee.
1. Build on the employee’s strengths:
* Always recognize the employee’s strengths and accomplishments and ask the employee to comment on anything else that deserves recognition.
* Ask if there is any way in which he/she believes performance could be improved and discuss plans for future improvement, including what coaching or training you can provide.
* Ask the employee to what extent he/she believes expectations are currently being met. State what you perceive to be the most appropriate evaluation rating. Ask questions and discuss both viewpoints.
1. When giving “bad news,” focus on performance, not the individual:
* Describe the specific behavior that needs the improvement and why (remember: who, what, where, and when).
* State your expectations of how the behavior must changed.
* Brainstorm with the employee how to correct the behavior.
1. When giving “good news,” focus on performance, not the individual:
* Describe the specific behavior that merits recognition.
* Indicate how the performance affects the workplace.
* Thank the employee for their efforts.
* Remember positive feedback is a motivator.
1. Encourage employee development, when appropriate.
2. Conclude the meeting by summarizing overall strengths and accomplishments and future plans to be implemented.

Some additional points….

Be honest and direct. Explain your rationale and give examples

Listen more than you talk and hear out the employee without interruptions.

Try to keep an open mind to what the employee has to say.

Avoid questions that beg for a “yes” or “no” answer… use open-ended questions to encourage dialogue.

And remember…there should be no surprises.

Adapted from CSUH Guide to Performance Management