Working Towards Anxiety-free Annual Performance Evaluations
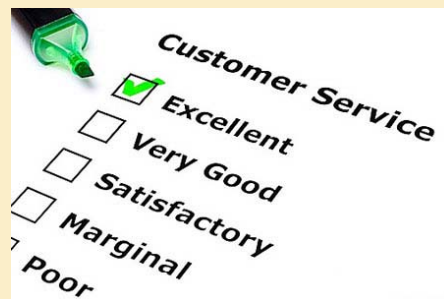
THE UNIVERSITY OF VERMONT
EXTENSION

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Run of show

1. **Introduction**
2. **Big picture**
3. **The Silver Bullet**
4. **Preparing for an annual review**
5. **Conducting an annual review**

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Big picture

<u>**You**</u> and <u>**the organization value the employee**</u>. Every employee deserves to be supported for **success** and **growth**. The annual review is a form of **respect** and helps employees understand their **strengths** and successes, as well as the areas they need to **improve** upon. They can **guide managers** too, on *their* paths to success!

👎 "Performance reviews take too much time!"

👎 "Employees know how they're doing!"

👎 "We're not allowed to say anything negative!"

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Annual performance reviews...

Improve overall performance of team members (and thus the organization)

Increase engagement

Help **identify** training needs
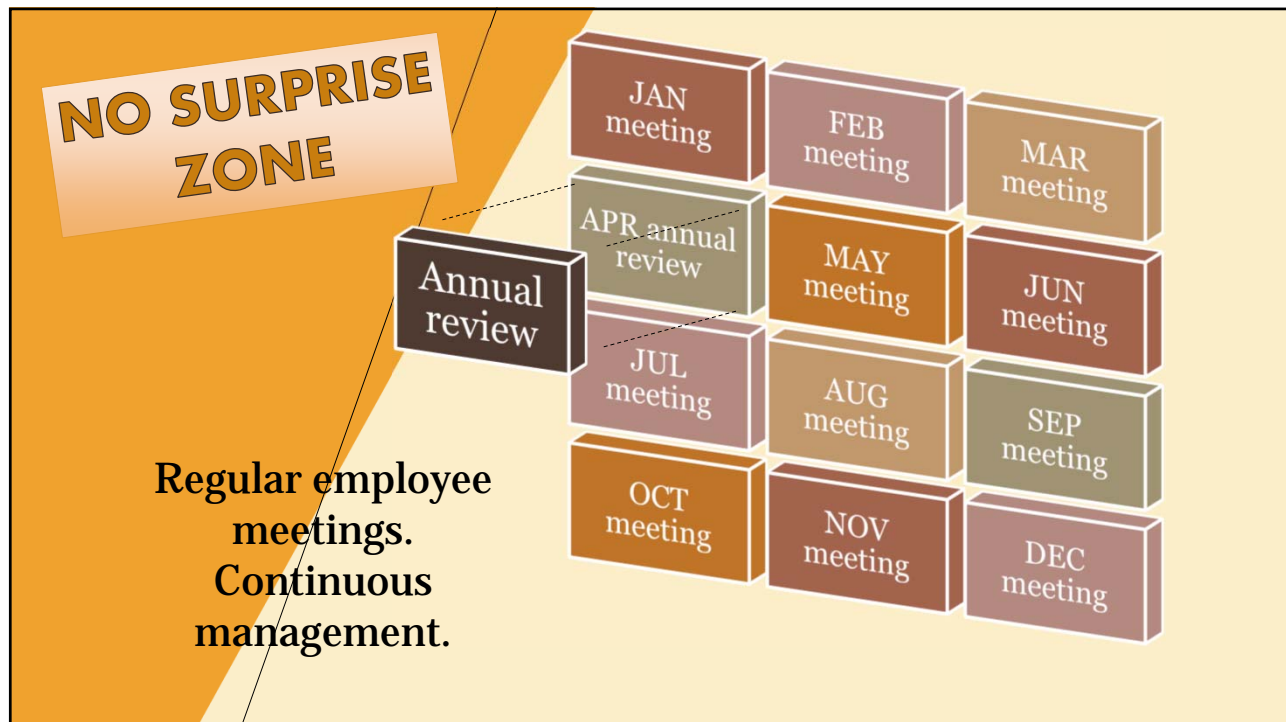
Guide promotions and pay raises

Can help managers understand how they can help!

An annual review is most often a "scale" review.

There are many kinds of reviews, like self-reviews, peer-reviews, and 360-reviews... the Internet is chock-a-block with good reference materials.

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NO SURPRISE ZONE

JAN meeting

FEB meeting

MAR meeting

APR annual review

Annual review

MAY meeting

JUN meeting

JUL meeting

AUG meeting

SEP meeting

Regular employee meetings. Continuous management.

OCT meeting

NOV meeting

DEC meeting

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What is an appraisal?

Evaluation of work progress and contributions

Systematic process with **predetermined standards** around **core competencies**

Attitude, work ethic, teamwork and cooperation, communication, attendance and punctuality, technical skills and mastery, quality of work, problem-solving, interpersonal skills, and customer service skills, and more!

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Core competencies: Park County Public Libraries

<< EXAMPLE

1. Job skills & knowledge
   1. Patron services
   2. Job knowledge
   3. Productivity/quantity of work produced
   4. Quality of work produced
   5. Working relationships
   6. Reliability
   7. Problem solving
   8. Adaptability
   9. Leadership skills
2. Work habits
   1. Attendance & tardiness
   2. Communication
   3. Record-keeping

Working relationships **standard**: "The employee interacts effectively with managers, coworkers, and internal customers. The employee acts as a team player in terms of cooperative spirit. Exhibits effective and positive communication skills."

Microsoft Word - Employee Evaluations.doc (lrs.org)

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Another EXAMPLE

Courtesy UVM HRS

Core competencies: University of Vermont

1. Job knowledge & innovation
2. Civility & cultural competency
3. Teamwork, colleagueship & communication
4. Responsibility & dependability
5. Work quality & quantity
6. Customer service
7. Leadership & management (supervisors)

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UVM Performance Standards

Unsatisfactory	Improvement Needed	Solid Performance	Exceptional Performance
• Lacks functional or technical proficiency. • Makes frequent technical or functional errors. • Fails to learn new skills, technology or processes. • Regularly displays poor judgment and/or lack of critical thinking. • Openly resists changes that improve or enhance operations.	• Inconsistently applies job-related knowledge and skills. • Inexperienced or new to the field, and requires some additional training or professional development. • Makes some technical or functional errors. • Inconsistently shares technical or functional skills with others. • Inconsistently applies critical thinking in decision making. • Does not seek direction when needed or appropriate. • Reluctant to make changes that improve or enhance operations.	• Possesses and applies the job-related knowledge and skills expected for the position. • Exercises sound judgment and critical thinking in decision-making, even in the absence of specific guidance. Seeks direction when appropriate. • Few technical errors; shares knowledge of technical skills or concepts with others. • Open to change, regularly contributes ideas for improvements in work methods and outcomes.	• Considered an expert in job-related knowledge and skills. • Applies advanced analysis, using functional or technical knowledge for the purpose of process innovation and complex problem solving. • Actively seeks improvements in work methods and outcomes. • Rarely makes technical/functional errors. • Promotes change.

Job Knowledge & Innovation

EXAMPLE

Courtesy UVM HRS

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Preparing for an appraisal

Is there a union?

Set a date, collect materials

- Current position description
- Employee's self-review, evidence, documentation
- Previous review and goals
- Current projects employee is working on
- Notes and other *documentation from regular formal meetings*

Give the review your highest priority

Write review

Review material before meeting

Self-reviews, if used

Read them after you write your review.

What are you most proud of?

Where do you see the most room for improvement?

What are specific behaviors you can take to improve in each area?

Performance Evaluations: What Not to Do » Public Libraries Online

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Conduct the appraisal

Is there a union? This makes a difference.

Choose quiet place where you won't be interrupted.

Meet on neutral ground.

Discuss the self review, if any

Review annual appraisal together

Listen; ask questions to clarify

Articulate employee's strengths

Provide constructive "balanced" feedback

Keep comments job-related

Be respectful

Set SMART goals for coming performance period

Follow up on goals and changes, if appropriate

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Balanced Feedback

Observation / Claim

Name a performance behavior (present or absent)

Evidence

Provide specific examples to support claim

Impact/Interpretation

Explain the effect of the claim on performance or the workplace.

Judgment

Discuss how the employee's performance rates in relation to agreed upon standards.

Courtesy UVM HRS

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Not helpful:

"Your email replies to patrons are unacceptable. You need to improve your responses."

Balanced Feedback

Observation / Claim
Name a performance behavior (present or absent)

Evidence
Provide specific examples to support claim

Impact/Interpretation
Explain the effect of the claim on performance or the workplace.

Judgment
Discuss how the employee's performance rates in relation to agreed upon standards.

Your email replies to library patrons are often unprofessional and incomplete. A review of your responses found that you frequently reply with one word, offer no further assistance and do not include a salutation or address the patron by name. You and I have discussed on several occasions at our monthy meetings the elements and importance of a professional and effective email. **Your one-word responses are not welcoming and often cause confusion to the recipient, as evidenced by their replies back to you. You are the first point of contact for many of these individuals, and your email communications reflect poorly on our library.**

Courtesy UVM HRS

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CAUTION
BIAS HAZARD

Attribution – all young people are good at tech.

Central – everyone is pretty much good.

Recency – cleaned up their act lately

Leniency – not wanting to go critical

Severity – not wanting to lighten up

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Specific	Not SMART
Measurable	"Be more helpful and professional with your email responses to patrons."

SMART
"Effective immediately, emails must contain:
1. A greeting that includes the patron's name,
2. Appreciation for their email and interest in the library,
3. Offer further assistance and additional resources as appropriate,
4. Conclude with you a closing and your name,
5. And copy me on all emails until such time that you are providing the expected level of customer service to these patrons (I will tell you when!)

By April 30, review the "business etiquette: phone, email and text" documents provided and apply concepts to your email immediately following."

Specific
Measurable
Attainable
Realistic
Timely

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How to make annual reviews better.

Reduce ANXIETY with	HAVE A GOOD TOOL	PLAN WELL	CONDUCT REVIEW	FOLLOW-UP
Regular formal meetings with employee to review work and goals. Keep notes! Notes are your key to an easy annual review write-up!	Based on **core competencies** with the scale well-defined (e.g., we know what "meets expectations" may mean). Collect examples from other libraries; improve when you needed.	Collect information, always base on **position description**, have notes from **monthly meetings**, self-review if using one (including goals for the coming year).	Neutral ground, listen, be respectful, set goals for the performance period.	Make changes in review if appropriate, confirm goals (and use these goals in the monthly meetings ahead!)

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Thank you

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