TIPS FOR CONDUCTING PERFORMANCE EVALUATIONS

I. Planning for the Evaluation Interview

Since the performance evaluation should be used as a constructive management tool to provide feedback and improve productivity and performance, significant planning is necessary if the evaluation is to be done effectively. Consequently, the following preparatory steps are suggested.

A. Review the job description and the priorities of the employee’s job.

B. Review samples of work to determine patterns, trends and exceptional or deficient issues.

C. If there are performance problems, consider the following ideas prior to completing the evaluation form:
   01. Do not allow a critical incident, either positive or negative to skew your assessment of the employee’s general performance.
   02. If there are problems for which the employee is not responsible, what assistance can you provide.

D. After arranging an appointment with the employee, but prior to the interview meeting, encourage the employee to prepare a self-evaluation.

II. The Purpose of the Interview

The evaluation interview should form the basis for improvement in an employee’s job performance. The purpose of the interview is:

A. To inform the employee of their overall performance and of the criteria used in the determination of this rating.

B. To clarify any misunderstandings about the job and what is expected of the employee.

C. To provide open discussion on how the employee can correct any weaknesses and build on strengths.

D. To build a stronger relationship between the supervisor and the employee.

III. Conducting the Interview

A. “Setting the Stage” for the interview:
   01. Schedule an appointment and allow sufficient time. Select a time when you and the employee are not under pressure.
   02. Pick a place that permits privacy and precludes the possibility of interruption.
   03. Have the necessary forms or factual information ready to present during the interview.
B. Beginning the Interview

01. Put the employee at ease and establish rapport. This can be done with a friendly greeting and a friendly statement that is of interest to the employee and requires a reply.
02. Explain the purpose of the interview and how the employee should have a clear understanding of the criteria used in determining the rating.

C. Discussing the Evaluation

01. If appropriate, compliment the employee on a job well-done. Failure to recognize good performance will foster a “what’s the use attitude.”
02. Make criticism constructive. If you point out a weakness, be prepared to suggest ways to correct it.
03. Clarify reasons why the rating was given, citing specific examples of performance.
04. Ensure that the employee understands what is expected of him or her. Otherwise, the employee may think he or she has been doing what you expect, when in reality that has not been the case.
05. Ask questions and listen. Allow the employee to express reactions to the evaluation. You may discover causes for inadequate or marginal performance.
06. Ask the employee for suggestions on how performance may be improved.
07. Keep the evaluation job-centered. Avoid discussion of personality shortcomings unless directly related to departmental operations or performance.
08. Maintain objectivity and composure.
09. Develop and obtain commitments on specific steps for positive actions and schedules for follow-up.

D. Ending the Interview

01. Summarize the discussion and plans for improvement.
02. Schedule a follow-up interview, if necessary.
03. End the interview on a friendly, constructive note.

Remember that the evaluation interview is part of a continuing process of communication between supervisor and employee. The next step is follow-up.

Please note: Any changes being made to a job description MUST be completed in PeopleAdmin.