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# A Supervisor's Guide on How to get the Most out of Performance Appraisals

## **Why do we have performance appraisal meetings, and how can they benefit you and your employees?**

Giving and receiving feedback is one of the critical components of the performance appraisal process. As a rating official, it is incumbent upon you to ensure that the feedback provided is meaningful, that you take the time to prepare and that the employee has a chance to ask questions and provide input.

Meeting with your employees to discuss how they're doing can and should be very beneficial for both of you. Following are a few of the benefits that can result from good preparation and an open discussion:

- You get a chance to provide information directly to your employee about your expectations and standards and to provide feedback on the work he/she did well along with any areas needing improvement.
- You get to provide the employee information about the "big picture" and how what he/she does contributes to mission/organizational goals.
- You get a chance to ask the employee about how he/she feels about his/her job--Whether he/she enjoys the work, if he/she is ready for greater responsibilities, if he/she is feeling too overwhelmed by the work already assigned, whether he/she needs more assistance from you or coworkers, etc.
- You get a chance to get to know the employee a bit better, and he/she gets to know you a bit better, too. The more you know one another, the greater the chances that you'll be able to communicate well on an ongoing basis, especially if a problem crops up.
- You get the opportunity to discuss your employee's future with him/her. That can be as simple as discussing training opportunities to better handle a specific project or something as broad as the employee's career aspirations and how he/she plans to get there.

## **What Should You Do to Prepare?**

While you are encouraged to provide feedback to your employees on an on-going basis, it is recommended that you meet formally with employees at least twice a year—once approximately mid-way through the performance appraisal cycle (called a Progress Review) and once at the end of the rating year. These meetings are a chance for you to engage in an open exchange with your employees about their performance.

Before the progress review or before you prepare the employee's appraisal:

- Request information from the employee on his/her key work accomplishments for the period being discussed. Keep a "kudos" folder for each employee with key accomplishments that you can refer to.
- If you have specific issues that you want to discuss with the employee, ensure that you have prepared to discuss these clearly and concisely. Think about (and document) what's most important for you to tell the employee about how he/she is doing.
- Write down what you feel the employee has done/accomplished/learned, what he/she did particularly well, and any areas in which you may have been disappointed in how the employee performed, including what they could have done better. You should include examples of specific projects or assignments.
- Think about whether the employee has the skills that you think he/she needs to do his/her job well, and write down any skills you think need to be gained or improved.
- Write down the key points and questions you want to discuss during the meeting. If in preparing for the performance discussions and/or finalizing the rating you believe that the employee is not performing at a fully successful level, you should immediately contact your Human Resources Office to discuss what steps to take prior to meeting with the employee.

### **The Performance Discussion**

During the actual performance discussion, you should review the employee's performance during the period in question including a summary of key accomplishments, praise him/her for work that he/she did particularly well, inform him/her of work that could have been improved and/or areas where he/she may need to focus more effort, etc. You should offer some examples, and give the employee the opportunity to ask questions for clarification or to provide information. This should definitely be a two-way dialogue rather than a lecture. In addition, you should:

- Ask the employee how he/she feels the past six months or year went, and what he/she liked and didn't like (with the goal of finding out in what ways he/she felt supported, or might have wanted feedback, or other information that you can use in working with the employee better in the future).
- Ask whether the employee has adequate training and resources to carry out his/her work. Ask the employee about his/her short and/or long-term career goals and offer suggestions or resources to assist him/her with these goals, as appropriate.
- Clearly articulate your expectations for the next six months or during the coming year and ask if the employee understands them. Be prepared to clarify any areas of confusion.
- Refer to your notes, so that you don't overlook any points that you feel are important.
- Ensure that the employee has a chance to provide feedback and ask questions.

Once you have finished your discussion with the employee provide him/her the appraisal form to sign. At the end of the rating year, make sure that he/she receives a copy of the completed appraisal form.

If the employee has concerns with the final rating, refer him/her to the appropriate individual who can provide that information. Don't forget that you can and should continue to discuss the employee's performance with him/her throughout the year. While the setting might not be as formal as during progress reviews or rating discussions, it's still important to keep talking, day in and day out, with your employees.