



Performance Evaluation Training



Purpose



- Provides a structure for leaders to evaluate employee performance.
- Serves as a vital tool to evaluate and improve job performance, motivation and communication.

Benefits



- Clarifies expectations of job performance and helps employees set and accomplish goals and career objectives.
- Keeps employees informed of what's expected and how well they are performing.

Additional Benefits



- Serves as a tool for promotions, merit increases, and other personnel actions.
- Recognizes accomplishments and contributions.
- Identifies and remedies weaknesses.
- Provides a continuous record of performance.

Roles and Responsibilities



Human Resources

- Notify departments of upcoming evaluations due
- Provide forms, procedures, guidance and training
- Review, log and maintain evaluations

Supervisors

- Appropriately and timely evaluate staff
- Facilitate discussion and tools to facilitate growth

Employees

- Participate in evaluation process
- Seek regular feedback
- Use resources provided to achieve goals

Performance Evaluation Period



How often should I evaluate?

- ✓ Ideally, quarterly for a probationary employee.
- ✓ Annually for all regular employees.
- ✓ Three months following any evaluation with an overall “2” score.
- ✓ As needed



Performance Evaluation Forms



- Officials/Administrators
- Professionals
- Technicians
- Service Workers
- Administrative Support
- Protective Services
 - *Safety employees (use current form)*
- Skilled Craft
- Para-Professionals

Employee Self-Evaluation



1 week prior to evaluation

- Employee lists goals
- Strength and weaknesses
- Areas of development or career enhancement and expected results.



Where do I begin?



Review Your Data

- ✓ Past performance evaluations/goals
- ✓ Job description
- ✓ Production records
- ✓ Commendations
- ✓ Complaints
- ✓ Employee counseling forms
- ✓ Sick leave usage (not protected leaves - i.e., FMLA)
- ✓ Supervisory Notes and Observations



Performance Factors



- Dimension Name



- Definition



- Key Actions/Areas

Performance Factors



Dimensions required for job success

Applied Learning

Assimilating and applying new job-related information in a timely manner.

Area/Key Action #1



Actively participates in learning activities – takes part in needed learning activities in a way that makes the most of the learning experience (e.g., takes notes, asks questions, and does required tasks).



Area/Key Action #2



Quickly gains knowledge, understanding, or skill – Readily absorbs and comprehends new information from formal and informal learning experiences.



Area/Key Action #3



Applies knowledge or skill – Puts new knowledge, understanding, or skill to practical use on the job; furthers learning through trial and error.



Competency Ratings



4

- Exceeds Expectations

3

- Meets Expectations

2

- Does Not Fully Meet Expectations

3-Meets Expectations



- People mistakenly think of a “3” rating as an indication of “average”.
- A “3” rating is considered Acceptable and is the **STANDARD** for successful job performance.

Comments Section



- ✓ Statements that support the ratings given.
- ✓ Specific and detailed examples of performance and behavior.
- ✓ Ensure comments are job-related.



For Example



Applied Learning

Assimilating and applying new job-related information in a timely manner.

Areas:	Rating
<i>Actively participates in learning activities</i> – takes part in needed learning activities in a way that makes the most of the learning experience (e.g., takes notes, asks questions, and does required tasks).	3
<i>Quickly gains knowledge, understanding, or skill</i> – Readily absorbs and comprehends new information from formal and informal learning experiences.	2
<i>Applies knowledge or skill</i> – Puts new knowledge, understanding, or skill to practical use on the job; furthers learning through trial and error.	2

Applied Learning



Jenny's grasp of field work is excellent. However, she needs to improve her data entry skills. She was provided one-on-one training, as well as department training on the SIRE. She needs to continue working on learning this system.

Other Accomplishments



- Important results and accomplishments.
- Skills and abilities the employee has beyond what's required.
- Supporting/Training activity
- Plans for improvement
- Development results/progress

Other Performance Factors



- Attendance and Punctuality
- Care of Equipment
- Safety Awareness
- Productivity
- Professional Appearance
- Professionalism



Overall Rating



- Review all factors and decide which are most important to the work of the employee.
- Make your judgment of total work performance using the competency rating.



Competency Ratings



4

- Exceeds Expectations

3

- Meets Expectations

2

- Does Not Fully Meet Expectations

Meet with Employee



- ✓ Be prepared.
- ✓ Meet in a quiet, private room.
- ✓ Help the employee feel at ease.
- ✓ Give honest and constructive feedback.
- ✓ Ask employee to share comments.



Meet with Employee



- Emphasize good points, with examples.
- Review the dimensions of the position.
- Discuss improvements needed and how they can be made.
- Focus on the job – not the person.

Meet with Employee



- ✓ Acknowledge and support the employee's comments and feelings as much as possible.
- ✓ Give them an opportunity to discuss ratings.
- ✓ If protests are valid, go over the report again.



Meet with Employee



- ✓ Encourage the employee to come to you with any questions, ideas, or difficulties.
- ✓ Conclude on a positive note.
- ✓ Ask the employee to sign the form; their signature indicates the ratings were discussed, and not that the employee agrees with the rating.

Performance Evaluation DO's



- ✓ DO welcome the opportunity to conduct performance evaluations.
- ✓ DO complete evaluations by due date.
- ✓ DO listen to the employee's opinion.

Performance Evaluation DO's



- ✓ **DO** discuss the performance evaluation with the employee.
- ✓ **DO** address issues as they occur and in the evaluation to provide constructive feedback on an on-going basis.
- ✓ **DO** document and record deficiencies.

Performance Evaluation DON'Ts



- **DON'T** be close-minded as it could damage communication
- **DON'T** avoid “sensitive” areas so as not to hurt employees’ feelings.
- **DON'T** wait until the evaluation to address issues/deficiencies

Performance Evaluation DON'Ts



- **DON'T** fear the performance evaluation process.
- **DON'T** procrastinate months later to complete the evaluation.
- **DON'T** just ask the employee to read and sign the evaluation.

Any Questions?

