Conducting Effective Performance Evaluations

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JUMP!

PERFORMANCE MANAGEMENT

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Top Five Best Practices in Performance Management

• Hire the Best People, Train them Well
• Have Clear Expectations – share them!
• Set Goals
• Communicate
• Give Feedback
Performance Management

• Process in which management and employees work together to accomplish the mission, goals and objectives of their organization

• More than an annual paper shuffle

• Few jobs remain constant, early feedback is vital
Performance Management

- **Continuous** on-going process of gathering information and communication about performance

- **Cyclical** process – planning, setting expectations, observation, evaluation

- Silence = approval of behaviors
Job Descriptions

• Foundational tool, essential to effective performance management

• Clarify job responsibilities and expectations

• In legal challenge situations, provides the supervisor with the ability to prove that the employee did know the expectations and standards
Performance Evaluation

• Personnel Policy 600 –
  http://www2.montana.edu/policy/performance_evaluation_policy.htm

• Management Best Practice

• An annual performance evaluation is required for classified and contract professional employees
Performance Evaluation

• Management best practice; ensures unit mission, goals, and objectives are in alignment and being met

• A more involved feedback session, with discussion, covering many aspects of performance over a period of time

• Formal, written, No Surprises!

• Done WITH the employee, not TO the employee

• Communicate, communicate, communicate
Performance Evaluation

• Two-way communication between employee and the manager

• Sets clear expectations to employees

• Employees want to know what is expected of them

• Facilitates employee development and growth
Feedback

• One of the most effective ways to reinforce or increase productivity involves providing employees with specific feedback about their performance, at a high frequency, immediately following the desired performance
Keys to Successful Performance Evaluations

• Identify performance expectations

• Be consistent in measuring and communicating the extent to which those expectations are being met

• Provide opportunities for feedback and clarification
Successful Performance Evaluations

Set/establish expectations and/or goals

- Focus on job related skills or activities – realistic and achievable
- Work performance and behaviors – objectively observable and measurable
- Reasonable indicators of successful performance are expressed in terms of quality, quantity, timeliness, cost
- Performance measures/indicators are subject to change, are not permanent, are not perfect
Conducting the Evaluation

• Plan ahead, plan for the desired outcome
• No Interruptions - Take the Time, Make the Time
• In writing, face-to face
• Formal official document
• Watch for personal biases – do not focus on personality traits
• No surprises!
Do’s and Don'ts

- Do - Establish clear performance expectations and review annually with each person

- Do - Focus on the employee’s behavior and job performance

- Do - Discuss individual instance of problem performance when it arises and how the problem should be addressed
More Do’s

• Do - Objectively describe what the employee did or did not do

• Do - Give credit where credit is due!

• Do - Review patterns of poor or unacceptable performance & write plan to improve performance with deadlines and milestones

• Do – Be discreet and follow up
The Don'ts

- Don’t generalize individual problems to the group
- Don’t ignore patterns of poor job performance
- Don’t become involved in personal problems
- Don’t recognize a “group” for an accomplishment of an individual - - - - recognize him/her!
“That’s my performance review?! Two thumbs up?!”
Rating Performance

• **Exceeds** – Frequently exceeds performance standards for the position. Employee makes unique and significant contributions to the department.

• **Meets** – Meets performance standards for the position. Consistently and effectively performs job duties.

• **Needs Improvement** – Fails to meet performance standards for the position. Improvement is needed.
Common Rating Errors

- Halo/Horn – opinion of one quality influences opinion of other qualities. All the same rating.
- Central Tendency – everyone in the middle, lack of rating between employees.
- Leniency – avoids honest ratings to avoid conflict – everyone near the top.
- Recency – greater weight to recent occurrences or events
- Similarity/Like me – favorable rating to employees who have similar values or interests to the rater
Classified Evaluations

• [http://www.montana.edu/pps/EmployeeRelations.htm](http://www.montana.edu/pps/EmployeeRelations.htm)

  • Version 1, developed with MPEA – ad hoc labor management committee

  • Version 2, historical form

  • If you wish to design an alternate evaluation tool for classified employees, it must be pre-approved by Employee & Labor Relations.
Professional Evaluations

- Affirmative Action Website
  - http://www.montana.edu/hraa/evaluations.html

- Two options available – Word and Excel – can be edited to fit your needs

- Please remember the **COVER SHEET** on all evaluations
Procedure

• Rebuttal process; No grievance process
• An employee who disagrees with the evaluation of his or her supervisor may submit a written request for review by the supervisor’s supervisor.
• The written request must outline the specific areas of disagreement and the reasons the employee disagrees with the supervisor’s evaluation.
• The decision of the supervisor’s supervisor will be the final decision on the evaluation.
• The employee’s written disagreement will be included with a copy of the final performance evaluation and placed in the employee’s personnel file.
FAQ’s

• Should probationary employees be evaluated during the probationary period?
  – Conduct the discussion immediately upon conclusion of the probationary period
FAQ’s

• My supervisor asked me to fill out a self evaluation. Is this legit?

  Yes! This method may meet multiple managerial needs:
  • Aids the face to face discussion
  • Self evaluation by the employee may help establish the thought processes for an effective discussion
  • May help align employee and supervisor understanding of the job duties
Tips to Remember

• Employee & Supervisor must **sign** the evaluation
• Send in the **ORIGINAL** evaluations not a copy.
• Complete Evaluation in Pen **not pencil**
• Please provide LEGAL name on Cover sheet
  – No nicknames
• Double check GID & Position number
  – Allows for tracking incoming evaluations & filing correctly
• Remember to include the coversheet located on the websites
More Tips to Remember

• If you say “see attached page” …make sure to attach the page.

• Self evaluation is not the Performance Evaluation that a supervisor can sign and submit without comments.

• Do not place comments on a post it note

• Wait until employee has been hired and is past their 6 month review to do a review

• Don’t put “jokes” on Performance Evaluations i.e. under goals - “Get fired”
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“What do you mean you don’t know what I’ve been up to recently?! Just follow me on Twitter!”