How to Achieve an Effective Performance Evaluation

Employee Informational Session
Tell Me: What Word or Phrase Describes Your “Best” and “Worst” “Performance Evaluation” Experience?
Overview

• Performance Evaluations:
  – How BSU Defines the Performance Evaluation
  – Why Needed and How Employees are Affected
• Example of a Performance Conversation (video)
• “How do I Achieve an Effective Evaluation?”
  – Suggested Steps
  – Discussion and Exercises
• Next Steps
What is a Performance Evaluation?

• A periodic and regular evaluation of your ability to:
  – Carry out assigned duties and
  – Carry out responsibilities

• An evaluation is concerned with your **results achieved**

• How well are you **Performing**?
Evaluation ➔ Conversation

• An on-going, two-way conversation
  – Designed to help the employee to:
    • Understand his / her responsibilities
    • How to improve job performance/behavior
  – Designed to help the supervisor to:
    • Improve working relations with employee
    • Clearly communicate expectations
    • Understand employee’s strengths and skills
Reasons We Do Performance Evaluations

• To answer **two essential questions** for each employee:
  – What do you expect of me?
  – How am I doing at meeting your expectations?

• Our goal is to have an evaluation system that is objective, fair, and consistent.

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Valued and Appreciated

We want you to receive an annual Performance Evaluation because you are definitely valued and appreciated!

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Reasons We Do Performance Evaluations

• To help the employee fit into the Ball State University culture

Positive Morale  Being Valued  Teamwork

Contributions  Sense of belonging
Reasons We Do Performance Evaluations

• To support *BSU Strategic Plan* and the *BSU Salary Plan*
  – Assist each employee in seeing her / his role in the *BSU Strategic Plan*
  • Discuss how your department supports *BSU Strategic Plan*
  – Provide documentation for *Salary Plan* decisions

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Salary Plan - Goals

- Contribute positively to the morale of employees and quality of work life
- Provide an incentive for achievement
- Reward meritorious performance
- Recruit & retain a quality workforce
What Are Some Ways Evaluations Affect Us?

- Our morale
- Our work satisfaction
- Our productivity
- Our daily performance

✓ All of the above
Impact on BSU
Quality of Life and Culture

• Team Building, One Person at a Time, Using Performance Evaluations
  – Have a conversation about an individual’s strengths, areas of growth needed
  – Help each see how her/his role contributes to team, department, and university
  – Create a culture of transparency and more open communications

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Let’s Watch an Example

Video: “Looking Forward” (12 min)
Discussion

Your thoughts?
What Can I Do To Prepare?

• Use the *Employee’s Guide to Preparing for the Performance Evaluation and Work Planning Conference (Staff Personnel)*
  – Collect Information to Share with Your Manager Verbally or in Annual Report
What Can I Do To Prepare?

• Be prepared to discuss the last 12 months

• Anticipate your manager’s point of view
  – What would he/she find helpful to know about your performance?
What Can I Do To Prepare?

• Review your Job Description
  – Draft suggested changes:
    • Outdated duties and responsibilities
    • New or updated duties (Banner, for example)

• Draft several Goals to discuss with your manager
  – Example: Prepare a Job Procedure Manual
Goal: Prepare a Job Procedure Manual

• Capture the many things you do at work are important but may not be in your Job Description
  – Step 1: Create an outline of tasks
  – Step 2: Collect examples/samples
  – Step 3+: Write a procedure about each example/sample; Repeat for each task
  – Create a schedule to track progress
Use SMARTER Goals

Specific
Measurable
Attainable
Realistic
Time-Based/Timely (Deadlines)
Extending Capabilities
Rewarding
Employee’s Supporting Documentation - Exempt

- Exempt Staff employees:
  - **Required** to provide annual report to supervisor:
    - Documenting performance in current year
    - Stating goals for coming year
  - Minimum of 2 goals for upcoming year
Employee’s Supporting Documentation – Nonexempt

- **Optional** for Nonexempt employees:
  - Prior to annual evaluation meeting, may submit a report & other documentation to supervisor
    - Outlines his / her performance
  - To be considered as part of annual evaluation, if submitted

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Prepare an Annual Report

• Prepare a document that summarizes your major job accomplishments
  – Avoid a rehash of daily routine activities
  – Focus on how you have added value
Tips for Preparing the Annual Report

• Begin by collecting information since your last annual review
• Address items in the order they appear on your Job Description
• Summarize data in charts
• Include a summary of accomplishments
Tips for Preparing the Annual Report

• Describe how you have gone “above and beyond” to fulfill your job

• Some use 3-ring binders to organize the materials
  – Include examples of work
  – Include copies of letters or emails expressing thanks or appreciation

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Before the Conversation

• Prepare to display a good attitude
• Refresh your memory of the last 12 months’ events you plan to discuss.
• Think about issues such as job satisfaction and how your manager could assist.

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Before the Conversation

• Ask yourself, “Have I met the expectations of my position?”
• Determine what your strengths are and if your strengths are being used.
• Review suggested changes for your Job Description
Before the Conversation

• Prepare an “elevator pitch”
  – Select your Top 3 accomplishments
  – Practice talking about each one for 30 seconds to 1 min
  – Talk about Problem/Action/Result
    • Describe the Problem, the Action you took, and the Result
    • Try to work each of the “pitches” into the conversation
During the Conversation

- Listen carefully, ask questions, and avoid acting defensively.
- When discussing your viewpoint, focus on *your* performance, not another employee’s performance.
- Ask for specific examples of what you should/should not do, if you’re not clear on your manager’s expectations.

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During the Conversation

• Gather information for next year about your manager’s own goals
  – Listen for ways you could directly support those goals with your goals

• Ask your manager to describe his/her “ideal co-worker”
  – Strive to tailor your work to exhibit those ideal traits
Good Listening Skills

• Listen with your eyes as well as your ears. Watch for nonverbal cues and body language.

• Be an active listener.
  – Restate your manager’s words in your own to ensure mutual understanding.
Good Listening Tips

• Listen for ideas, not just for facts.
• Control your emotional reaction.
• Overcome personal prejudgments and distractions.
• Keep an open mind.
More Good Listening Tips

• Hear the other person out; don’t interrupt.
• Learn to practice “active listening”.
• Paraphrase frequently in your mind and aloud to the speaker.
• Focus on the person speaking.
Your Non-Verbals

• Good news if you “talk with your hands!”
  – Psychologist and author Jeremy Dean cites two studies
    • Gesturing while speaking helps persuade the listener
    • Gesturing also helps us think and remember information
Your Non-Verbals

• Use open, positive body language

• Examples:
  – Lean forward
  – Use good eye contact
  – Maintain good posture
  – Angle body toward speaker
Seek Ways to Develop

• Attend some Learning & Development sessions *(and invite your Supervisor!)*
• Use the *L&D Session Guide* to help find ways to *work smarter!*
• See chart of Performance Evaluation factors in *Guide*
Upcoming Sessions

- **Feb 19**: Making Your Point without Losing Your Cool
- **Feb 19**: Strengthening Your Relationships with Management
- **Feb 25**: Emotional Intelligence: Use Yours When Others Don’t Use Theirs
- **Feb 25**: Make Your Own Job Satisfaction
- **Mar 6**: Team Building (am) Champion Mindset (pm)

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Concluding the Conference

• Your Supervisor should summarize key points discussed.

• If Good Review: *Good job!* Do it again in the coming year!

• If Poor Review: Take seriously that you must show **immediate** and **lasting** change.

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Discussion

• What tips or ideas did I overlook that have worked for you to prepare for a successful performance evaluation?
Enjoy the Conversation!

• Performance Evaluations are your process, shared with your Supervisor, not HR’s process

• Actively participate in the Performance Evaluation process
Next Steps

In the next several weeks how are you going to prepare for your coming performance evaluation?

As soon as possible, submit your summary to your supervisor!

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HR is prepared to assist you as needed.

Thanks for attending!