Preparing for the Performance Review:

See yourself as a leader. If you approach the appraisal process as your employees’ buddy, you’ll have difficulty being objective – and they’ll have difficulty accepting your feedback.

Spend time with your employees. The more familiar you are with your employees and their performance, the more accurate and acceptable your feedback will be.

Gather and review all relevant data. Look through your notes and supplement them with your employees’ job descriptions, last year’s appraisal, and the goals and objectives that you established with your employees.

Complete the evaluation forms. Start with written comments and phrases, and then select numerical ratings. Save goals and objectives for you and the employee to complete together.

How to Conduct a Performance Review:

Open on an upbeat note. Start the discussion with friendly greetings – this sets the tone for the rest of the session.

Ask for questions. This will raise employees’ comfort level and eliminate nagging issues that could distract them.

Focus on performance. Keep your feedback focused on your employees’ performance, especially in terms of meeting objectives, achieving goals, handling critical incidents, and developing competencies.

Discuss the evaluations. Walk through the evaluations with your employee(s) and provide them with specific information regarding the rationale behind your ratings.

Listen actively. Rephrase and summarize what your employee(s) say, to make sure you truly understand them.

Clarify the overall ratings. Discuss the overall ratings with your employee(s) and provide specific information regarding the criteria that you used to determine them.

End the sessions positively. Summarize the discussion, ask for final questions, set follow-up dates for goal setting, have the employee sign hard copies of the evaluations, and end with positive expectations.

How to Follow Up after a Performance Review:

Shift your focus from your employees’ past performance to their future performance.

Set performance goals with each employee. These goals focus on the employee’s specific performance on the job such as productivity, dependability, competencies, and behaviors.

Set developmental goals with each employee. These goals focus on building the employee’s expertise, skills, and abilities. The idea is to make strengths even stronger, as well as to develop the areas in which the employee’s knowledge and skills are deficient.

Create real goals. Real goals are specific, achievable, prioritized, measurable, supported by action plans, aligned with the district, linked to your goals, and accepted by you and your employees.

Be a coach. Take the time to regularly recognize your employees when they’re performing particularly well, and to provide them with formal and informal coaching, guidance, feedback, direction, and follow-up not only to further build their strengths, but also to upgrade their performance in areas where it has fallen short.
Positive Attributes:
- Adapts well to change
- Works well under pressure
- Maintains a positive attitude when under stress
- Is an active listener
- Demonstrates effective communication skills
- Is highly professional
- Is someone that can be depended on
- Manages time well
- Seeks out responsibility and follows through
- Pays attention to details
- Constantly seeks professional development opportunities
- Happy to be here
- Demonstrates a high level of self confidence
- Demonstrates a high level of self esteem
- Has a pleasant personality
- Follows directions well
- Accepts responsibility willingly
- Goes beyond the call of duty
- Exceeds expectations
- Demonstrates a sense of humor
- Is highly conscientious about the quality of work
- Gets along well with coworkers
- Strives to cooperate with all staff
- Is very thoughtful and considerate of other staff
- Takes criticism well and learns from mistakes
- Demonstrates a strong team playing ability
- Works well independently
- Accepts responsibility eagerly
- Work demonstrates conscientiousness
- Is highly enthusiastic
- Shows great flexibility
- Mature and responsible
- Isn’t afraid to ask questions
- Shares information clearly and concisely
- Is bright and talented

Performance Improvement
- Is developing a better attitude towards (insert previous problem)
- Is showing more interest and enthusiasm
- Is demonstrating a higher degree of independence
- Has strengthened his/her skills in (insert area of improvement)
- I am encouraged at (insert name)’s level of commitment towards professional growth
- Needs to improve the speed to complete (insert type of task)
- Needs to demonstrate more of a team player attitude
- Needs to improve on follow through
- Capable of stronger performance in (area of weakness)
- Needs more training in (insert area)
- Sacrifices accuracy for speed
- Shows an inconsistency effort in (insert task)
- Is a poor time manager, consistently missing deadlines
- Doesn’t listen to directions
- Has difficulty prioritizing workload
- Shows a lack of energy and/or interest in the work

Potential
- Has great potential for a leadership role in the future
- Is strong in (insert skill)
- Has background in (insert area of expertise) that is being underutilized
- Is considered to be star talent in this department

Contact Human Resources if you have questions about preparing and/or conducting performance reviews.

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