

Participating in Your Own Performance Evaluation: Tips for Employees

Although performance evaluations are conducted annually, it is good practice to discuss feedback regarding your performance throughout the year such as in a quarterly conversation. The evaluation is intended to be the last task in what should be an ongoing, year round process of managing performance.

Two-way communication between employees and supervisors is critical to everyone's success. Receiving feedback and candidly addressing concerns can build a more productive work environment. An open dialogue can help clear the air and pave the way for an effective performance evaluation with no hard feelings and a clear perspective on expectations. Nothing contained in the performance evaluation should be a surprise; it should not be the first time you hear about an issue.

What's required?

- In general, the University requires that supervisors conduct a performance review of each employee in writing at least once, annually.
- The performance review is a communication tool between you and your supervisor and is part of the official personnel file. This is a conversation documented in writing.
- The performance review looks at specific areas, goals and standards of performance and your progress toward meeting them, as well as future goals and your own development.
- Your supervisor will use the approved annual performance evaluation form.
- You have the option of using the approved self-evaluation form.

The pre-review checklist and preparing for the review

1. Gather:
 - the job description and performance standards
 - objectives set from the review period
 - your own documentation notes, status reports, or self-assessment
 - FY goals, activities and quarterly conversation documentation
2. Before preparing your self-assessment documentation, take a moment to:
 - list your main areas of responsibility
 - areas you have done well
 - areas you need to improve
 - what you need from your supervisor in order to do a better job
3. Remember to:
 - Be comprehensive, but concise and specific. ["I believe flexibility is one of my performance strengths. This is demonstrated in the way I handled the constantly changing priorities during Fiscal Close in June."]
 - Be as objective, honest, and realistic as possible.
 - Compare your performance to the expectations, standards, and objectives that were set.

Writing it down and putting it all together

- What are your major accomplishments?
- What could you have done better?
- Do you understand what is expected of you? Are performance standards and work rules clear?
- What training or professional development do you need?
- Would you like to see your responsibilities change? How? Why?
- What career goals do you have? What do you need to attain those goals?
- How are relationships going with your co-workers? What could they do to help you perform your job better?
- What could your supervisor do to help you perform your job better?

Do I know what is expected of me?

A self-assessment exercise:

1. The purpose of my organizational unit is:
2. The purpose of my job is:
3. The customers I serve are:
4. Some of my daily responsibilities in my job are:

The three most important responsibilities of my job are:

- 1.
- 2.
- 3.

Results:

- How did you do? If you had difficulty completing the exercise, you may find that you and your supervisor are not in tune.
- To create an effective partnership with your supervisor, it is essential to know your supervisor's most important priorities.

Handling the review meeting

1. Remember that the review meeting is a discussion and a dialog between you and your supervisor.
2. Maintain good eye-contact, attentive posture, and a professional manner.
3. Listen and take notes.
4. Reflect back to your supervisor your understanding of what s/he said.
5. Compare the actual specific performance results and behaviors to the objectives. Stay away from blaming others and making excuses.
6. Emphasize strengths, as well as areas that need improvement.
7. Be honest and take responsibility.
8. Provide your ideas on how to resolve problems.
9. If unclear, ask for specific examples.
10. Set goals, expectations, and objectives together for the next review period.

***This step should occur in a future meeting so that you and your supervisor have time to absorb the feedback in the performance evaluation and understand how it relates to the next FY goals and activities.

11. Discuss development and training needs.

***This step can also be delayed for a future meeting so that you and your supervisor have time to absorb and understand the feedback in the performance evaluation.

12. Share with your supervisor what you need to do your job more efficiently.

Closing and follow-up

1. Both you and your supervisor should sign the review document. Signing the document means it has been shared with you. If you disagree with the review, you can provide a written response, which is optional.
2. You will be provided a copy, and the original will go in your personnel file.
3. You and your supervisor should exchange ongoing feedback about performance goals and objectives throughout the year. Schedule a time to meet to discuss FY goals and activities (to be completed in quarter 1 months of July – September).