Tips for Performance Reviews

In each issue of Resources, we offer tips about how to engage in a robust performance management process. This helps to meet President Gee’s expectation that every regular staff member will be involved in a performance management process by July 1, 2011.

Performance reviews are positive two-way conversations designed to identify your strengths and areas for development, create an opportunity for you to share needs for coaching, feedback, and professional development, and strengthen your relationship with your manager. The process prepares you for the future.

The performance management process is a shared responsibility between managers and employees. This holds true for performance reviews, and both managers and employees need to prepare for the review to ensure a successful conversation.

The Manager’s Role
There are several steps managers can take to ensure performance reviews are productive. These steps include:

- Prepare yourself. Review your employee’s job description, performance expectations, goals, and performance documentation such as customer comments and notes from your coaching sessions. Use that information to determine areas of excellence and developmental opportunities, and assign realistic performance ratings. Also, develop a list of questions to engage your employees in the discussion, such as what they see as their strengths and opportunities for development, and how you can help them optimize performance.
- Prepare your employee. Give advance, personal notice of the meeting and point out the value each of you can realize from the review. Define the rating scale on a written evaluation, and the format of your meeting. Ask your employee to do a self-assessment prior to the meeting to gather his or her perspective on performance, and what he or she needs from you.
- Set the stage. Schedule ample time for discussion; a 60-90 minute meeting is recommended. Select a neutral setting that will put your employees at ease. Also, remind yourself about ways to offer effective feedback.

The Employee’s Role
Employees also play a role in creating successful performance reviews. Here are some steps you can take to prepare for your review:

- Complete a self-evaluation. Self-evaluations help to ensure that you and your manager are on the same page. This self-reflection helps you identify your most important job responsibilities, strengths, and opportunities for growth. Some questions to consider when completing your self-appraisal include: What did I learn? How did I grow? What would I do differently? What do I feel really good about? What do I need from my manager?
- Reflect on what you want to gain from your performance review. Think about your goals for the conversation and what would make it more meaningful and helpful. This could include more concrete ideas for development, a better understanding of your manager’s expectations, or ideas to build a stronger relationship with your manager. Share these goals with your manager, and think about what open-ended questions to ask that will help you understand your manager’s thinking and perspective.
- It’s important to approach the performance review conversation with positive thoughts, and to be honest and candid. Feedback is appreciative and constructive, and intended to help you reach your full potential. Listen to feedback with active, full attention to become aware of how you are doing, offer ideas to help you plan your own development, and compare how you think you are doing with what other people tell you. Also, sharing your perspectives in a constructive, honest manner improves communication, and helps you and your manager talk through any differences.

The importance of coaching and feedback
Ongoing coaching and feedback are important to the performance management process. When there is a culture of ongoing coaching and feedback, there are no surprises or anxiety around performance reviews because managers and employees have had regular conversations regarding performance throughout the year. Managers and employees should offer and seek out feedback throughout the year.

When managers and employees take an active role, performance reviews become a lot less scary, and a lot more meaningful. Additional information, including a copy of the policy, tip sheets, job aids, and templates, is available on the Performance Management page on the Office of Human Resources web site.

Characteristics of an Effective Review

- A shared responsibility
- A participative process
- A means to recognize achievement
- An opportunity to set or re-calibrate goals

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