Objectives

- Explain why continual performance feedback is the key to motivating employees and reaching organizational goals.
- Apply the Plan Do Check Act (PDCA) process for preparing for and conducting effective performance evaluations.
- Write effective performance evaluations that give the employee a clear understanding of their goals, in what areas they have excelled in, and what areas need more focus.
- Deliver performance evaluations confidently.
- Implement a simple coaching strategy that will enhance employee performance.
Common Myths

- Performance Appraisals are just a formality
- Performance Appraisals are uncomfortable
- Appraisals are not meaningful
Big-Picture Process

Performance Appraisal Process

1. Review Competencies
2. Review Job Description
3. Set Work Goals
4. Review with Supervisor
5. Conduct Work & Record
6. Observe & Record
7. Interim Checks
8. Adjust Plan if Needed
9. Annual Review of Results

Coaching

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Vision, Mission, Strategy, Goals
Unit Goals
Review Career Development Plan
Operational Process

Employee completes checklist and Self-evaluation → Supervisor gathers and analyzes data Supervisor checklist → Supervisor drafts performance evaluation

Supervisor schedules appraisal meetings → Supervisor facilitates appraisal meeting → Supervisor modifies appraisal content, if needed

Supervisor & employee sign final appraisal forms → Supervisor obtains signature from level-up supervisor → Supervisor and employee maintain copies of signed forms
Manager’s Role

Plan

Act

Check

Do
### Plan – Documentation

<table>
<thead>
<tr>
<th>Employee</th>
<th>Supervisor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checklist</td>
<td>Checklist</td>
</tr>
<tr>
<td>Self-Evaluation</td>
<td>Performance Observations</td>
</tr>
<tr>
<td>Work and Development Goals</td>
<td>Performance Appraisal</td>
</tr>
</tbody>
</table>
Plan – UA Core Competencies

- Advancing the Organization
- Communication
- Technology Acumen
- Performance Management
- Organizational Performance
- Customer Focus
Plan – Writing the Appraisal and Goals

- **Appraisal**
  - Be specific.
  - Use action verbs.
  - Provide concrete performance examples.

- **Goals**
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Timely
Do – Conduct Meeting

- Communication
  - Show respect
  - Give honest feedback
  - Be positive
  - Manage emotions
  - Embrace your strengths
  - Face your shortcomings
Check – Post-Review Follow Up

- Modify the performance evaluation write-up based on the joint discussion, if appropriate.
- Finalize and sign the Employee Evaluation Form.
- Give final copy of form to employee for his/her signature.
- Route all completed forms to next level supervisor for his/her signature.
- After all signatures are secured, retain copies for departmental file.
- Give final copy to employee.
Coaching and Feedback

- Work with your employees regularly.
- Be supportive.
- Evaluate performance constantly.
- Praise good performance – when you see it, say it.
- Correct poor performance – make it private, make it positive.
- Work together on solutions to reach employee, department, and organizational goals.
Wally, what are your goals for the coming year?

My goal is to replace my soul with coffee and become immortal.

I mean something about work.

Oh, I thought you said my goals.

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