

# Performance Evaluation

Tuesday, April 10, 2018 4:40 PM

Presented by Elizabeth Montes.



## Performance Evaluation

**Systematic** process to evaluate how well an employee is performing in his or her job. Systematic implies that the performance evaluation process should be a planned process allowing feedback and evaluations to be given in a formal way. This way the process is not subject to the manager's personal criteria, but to the evaluation of SMART (Measurable, Specific, Achievable, Relevant and Time bound) goals defined and agreed between the manager and the employee at the beginning of the period to evaluate.

### Performance Evaluation Process Key Success Factors

- Motivate employees and managers by promoting several ways of recognition, improve communication to all levels of the organization, and create a work-life balanced style of work.
- Evaluation should be conducted fairly, consistently and objectively to protect employees and the organization.
- Standardized evaluation forms, performance metrics, feedbacks, guidelines and disciplinary procedures.

**To create a performance evaluation process for your organization you can follow these five steps:**

- 1.- Develop an evaluation form
- 2.- Identify performance metrics
- 3.- Set guidelines for feedback
- 4.- Create disciplinary and termination procedures
- 5.- Set an evaluation schedule

### Develop an evaluation form

Performance evaluation's should be conducted fairly, consistently and objectively to protect your employees' interest and to protect your organization for legal liability. One way to ensure consistency is to use a standard evaluation form for each evaluation. The form you use should focus only on the essential job performance areas. Limiting these areas of focus makes the assessment more meaningful

and relevant and allows you and the employee to address issues that matter most.

For most staff positions, the job performance areas that should be included on a performance evaluations form are **job knowledge and skills, quality of work, quantity of work, work habits** and **attitude**. In each area the manager should have a range of descriptors to choose from (**below requirements, meets requirement's, exceeds requirements, far exceeds requirements**). Depending on how specific the descriptors are, it is often important that the manager also have space on the form to provide the reasoning behind his or her rating.

Performance evaluations for those in management's positions should assess more than just the essential job performance areas mentioned above. They should also assess the employee's:

- People skills
- Ability to motivate and provide direction
- Overall communication skills
- Ability to build teams and solve problems.

### **Identify Performance Metrics**

Standard performance metrics allow you to evaluate an employee's job performance objectively and they can help you cut down on the amount of time and stress involved in filling out the evaluation form.

The performance metrics should include:

- Quality Metrics
- Quantity Metrics
- Efficiency Metrics
- Organization Performance Metrics
- Organizational Values

### **Set guidelines for feedback**

Feedback is what performance evaluations are all about. Before you implement your performance evaluation system make sure that everyone who will be conducting evaluations knows what kind of feedback to give, how to give it and how to get it from the employee in return.

The feedback should be:

- Balance (Emphasize good aspects and then aspects to be improved)
- Outline expectations for improvement
- Encourage feedback from the employees

### **Create disciplinary and termination procedures**

At least the following procedures should be available to managers to use when an employee's performance deteriorates:

- Verbal warning
- Writing warning
- Termination

### **Set an evaluation schedule**

Decide when to conduct the performance evaluation. Some organizations do all employees at the same time of the year while others conduct them within 30 days of each employee's anniversary. Ignoring employee's overdue evaluations will make them feel devalued and may hurt moral and performance.

