

National Association of Bar Executives

Performance Evaluation Boot Camp

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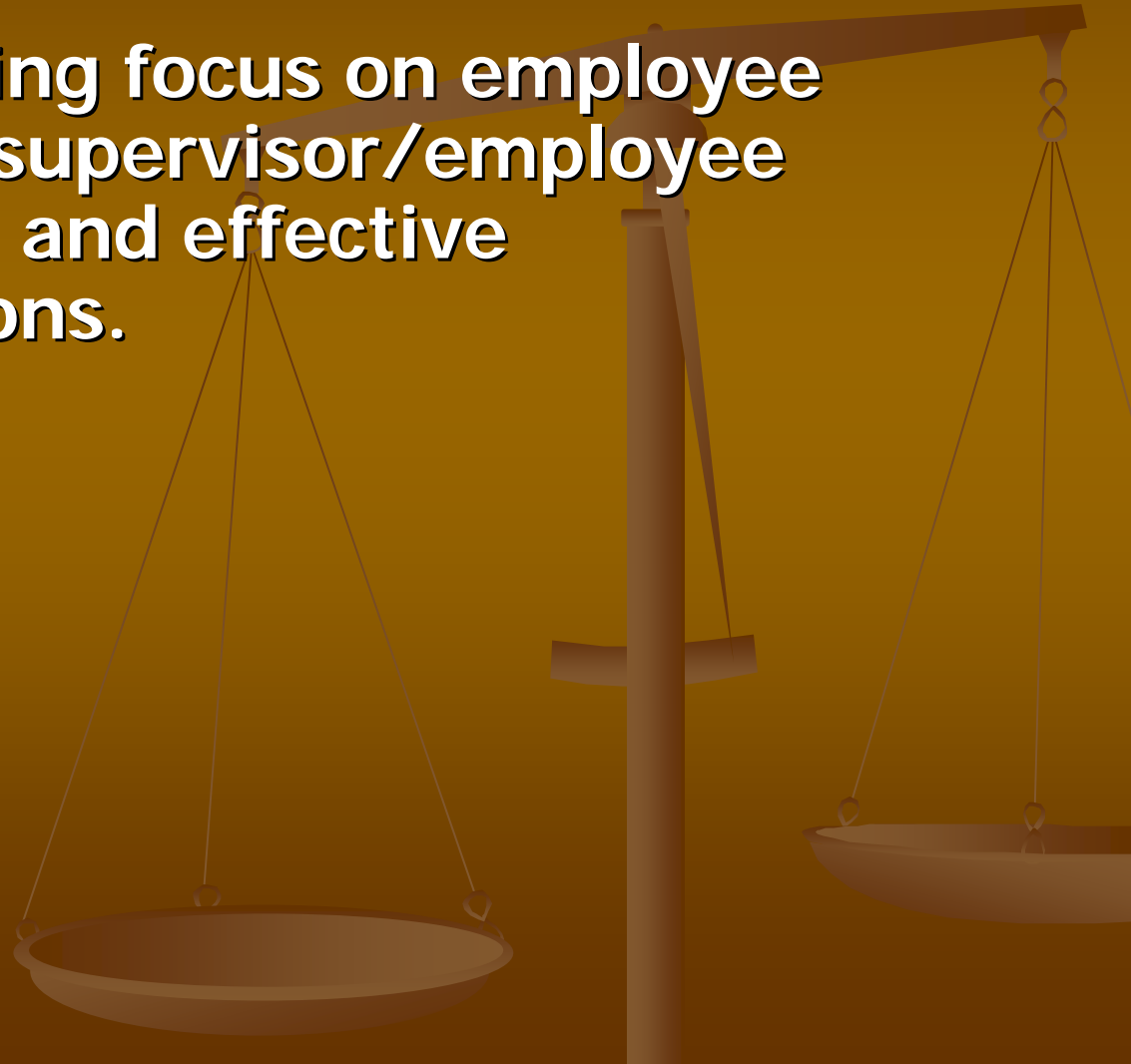
Performance Management




- Ongoing process of developing and managing employee performance to achieve the organization's goals and strategies.
 - Identifies and communicates the organization's goals or business strategies.
 - Establishes performance targets for the organization, each department/work unit, and each position/employee.
 - Structures workplace activities, resources, and priorities to meet those targets.

Performance Management (cont.)

- Creates ongoing focus on employee productivity, supervisor/employee relationships, and effective communications.



What Does Performance Management “System” Mean?

- Ongoing and continuous process
 - Organization mission
 - Organization culture
 - Individual differences
 - Roles and expectations
 - Training and skills
 - Rewards
 - Communication and feedback
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Formal Processes

- **Introductory period**
- **Annual review**
- **Promotional reviews**
- **Disciplinary action**

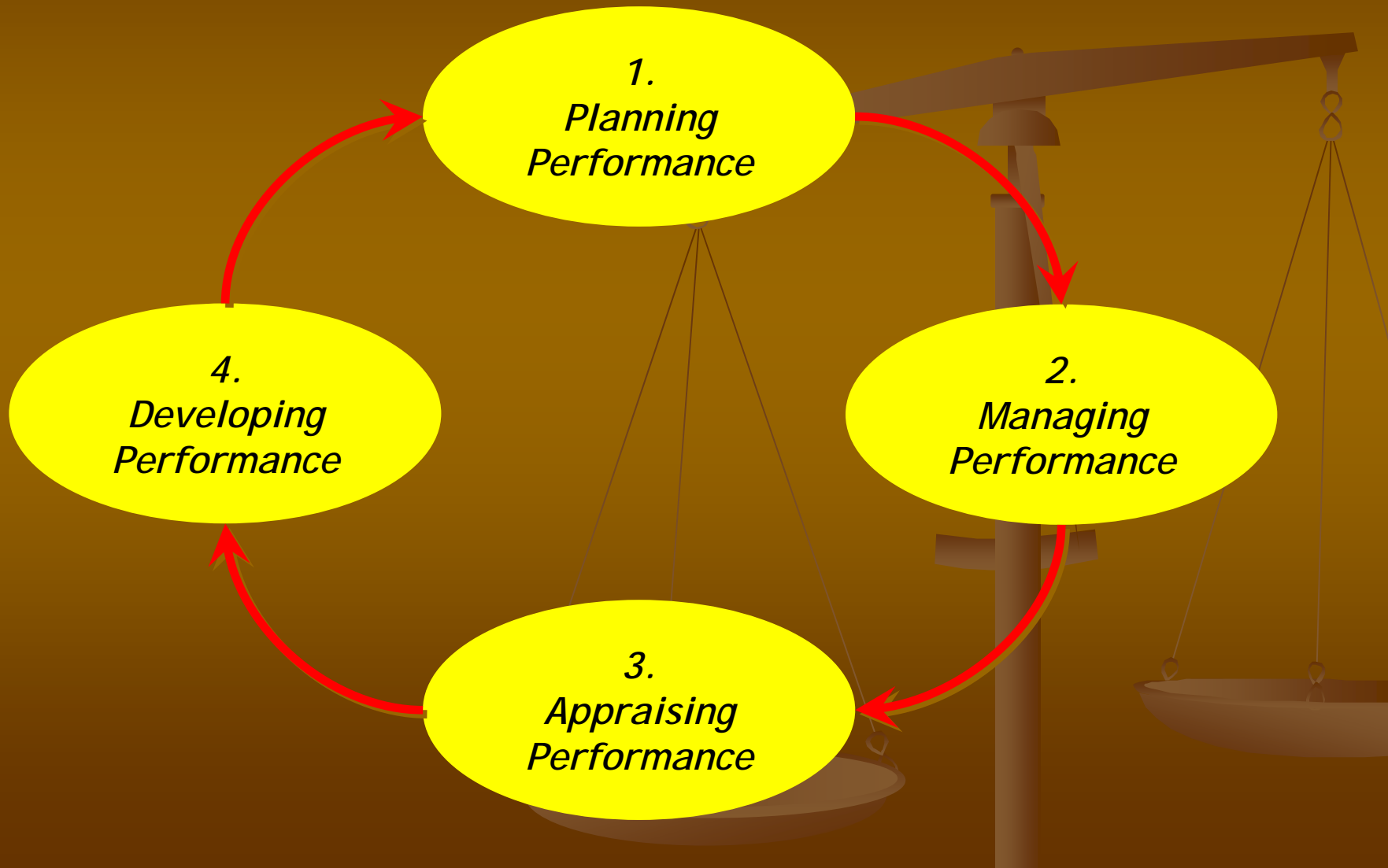


Informal Processes

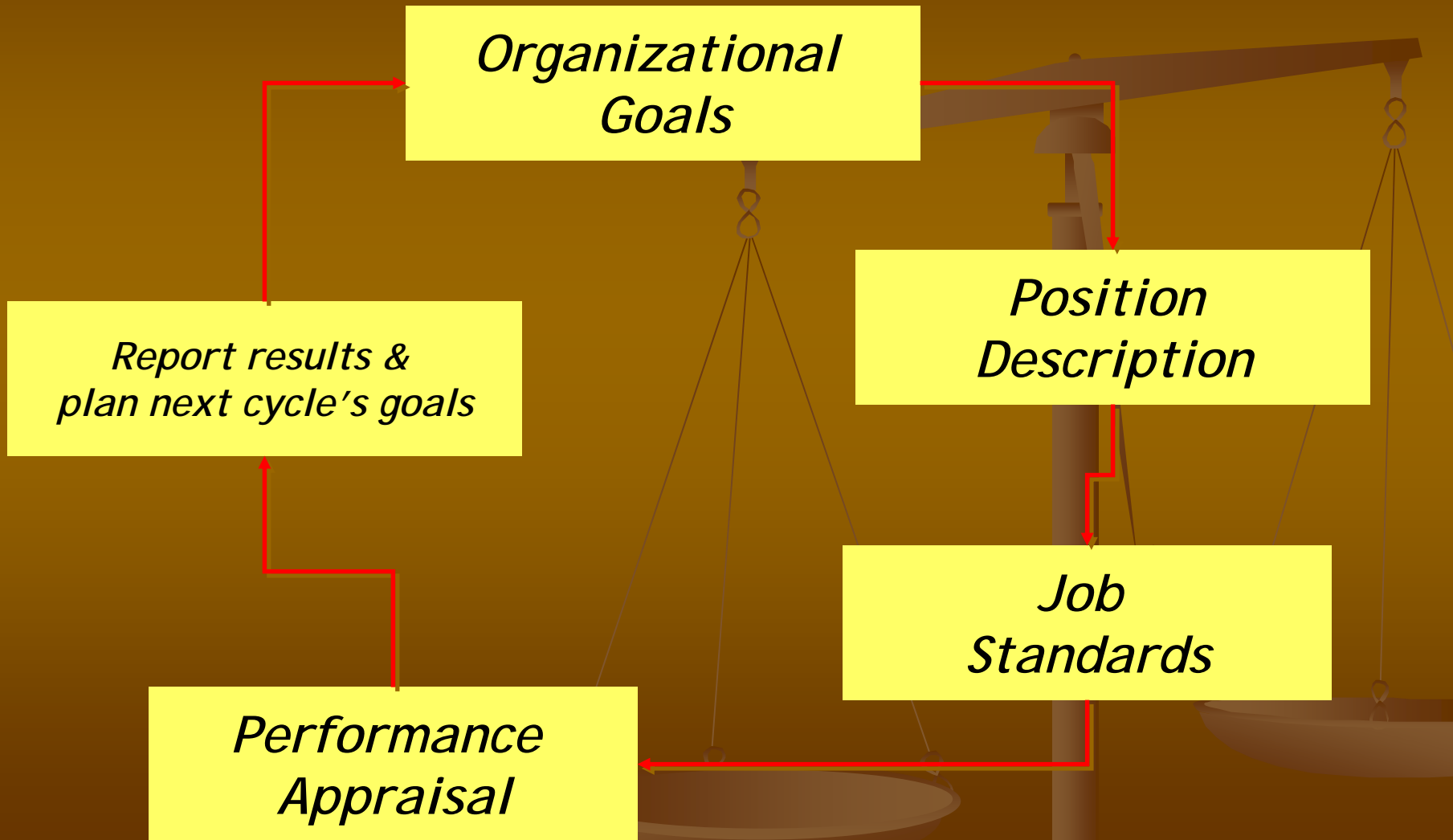
- **Coaching**
- **Counseling**
- **Praise**
- **Progress reports**



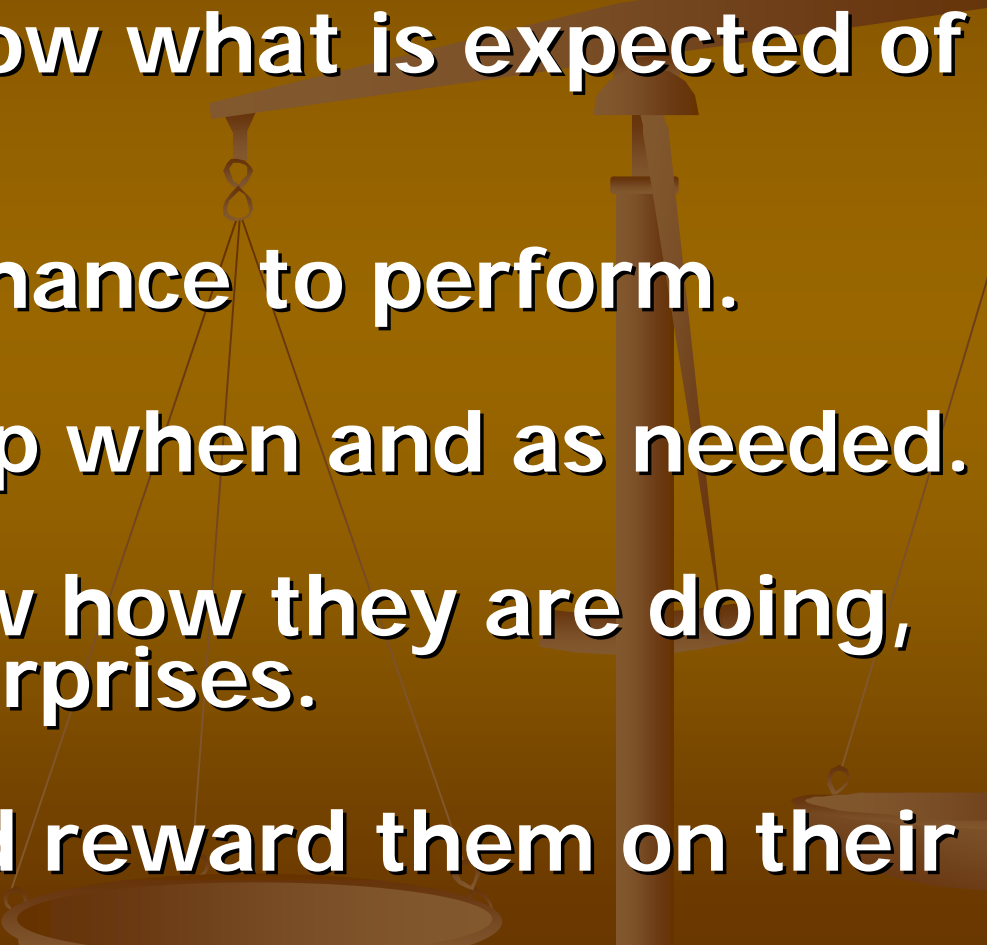
Four Phases of Performance Management



Organizational Goal Individual Performance Flowchart



Basic Organizational Management Principles

- Let people know what is expected of them.
 - Give them a chance to perform.
 - Give them help when and as needed.
 - Let them know how they are doing, eliminating surprises.
 - Recognize and reward them on their results.
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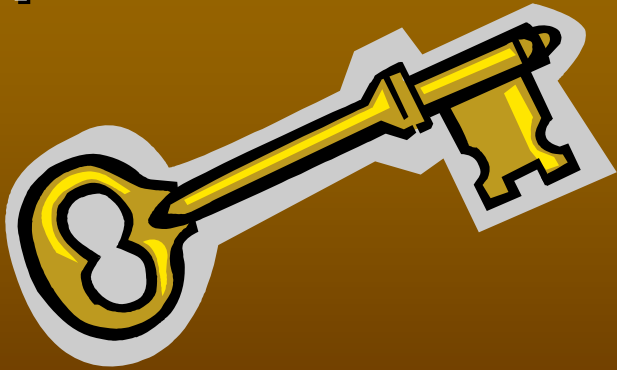
Keys to Improving Performance

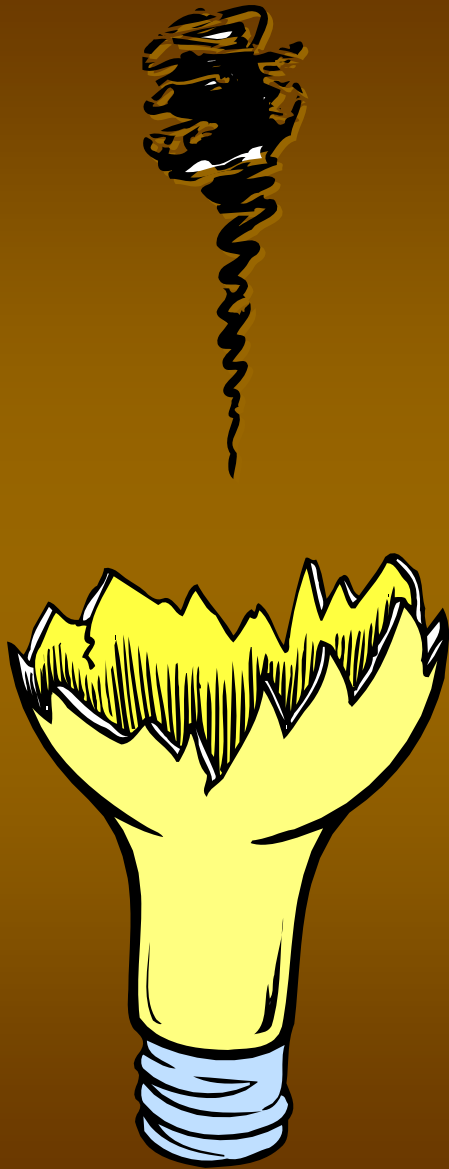


- Provide feedback on an on-going basis.
- Set up a meeting with the employee to discuss the performance problems.
- Stay positive and friendly, actively seeking and listening to your employee's ideas.
- Agree on the specific actions that each of you will take.

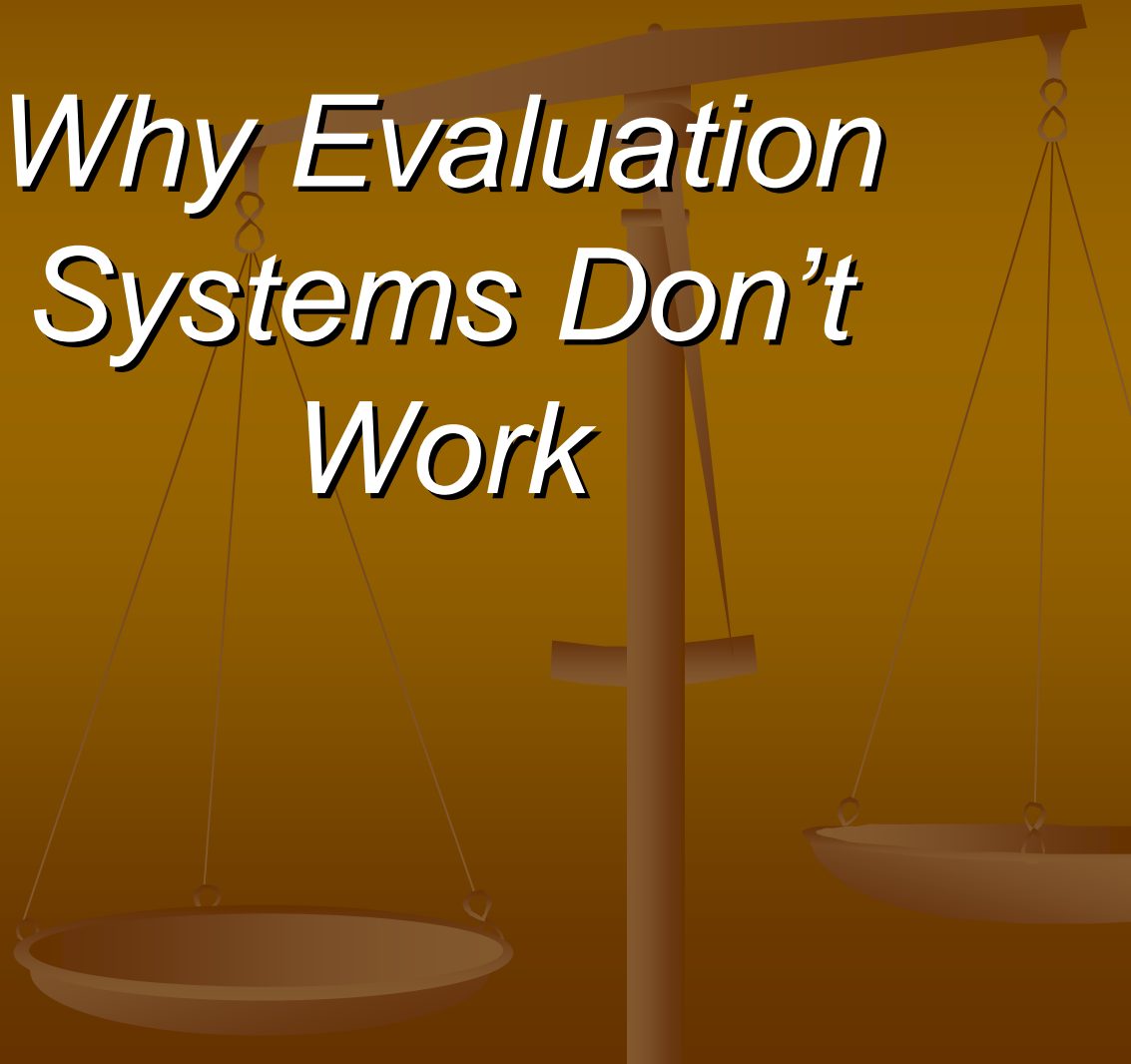
Keys (cont.)

- Set a specific follow-up date to check on progress.
- *Work together* to improve performance.





Why Evaluation Systems Don't Work



Rater Errors to Avoid

- The Halo Effect
- The Pitchfork Effect
- Recency Error
- Rater Bias
- Contrast Effect
- Leniency/Tight Ratings

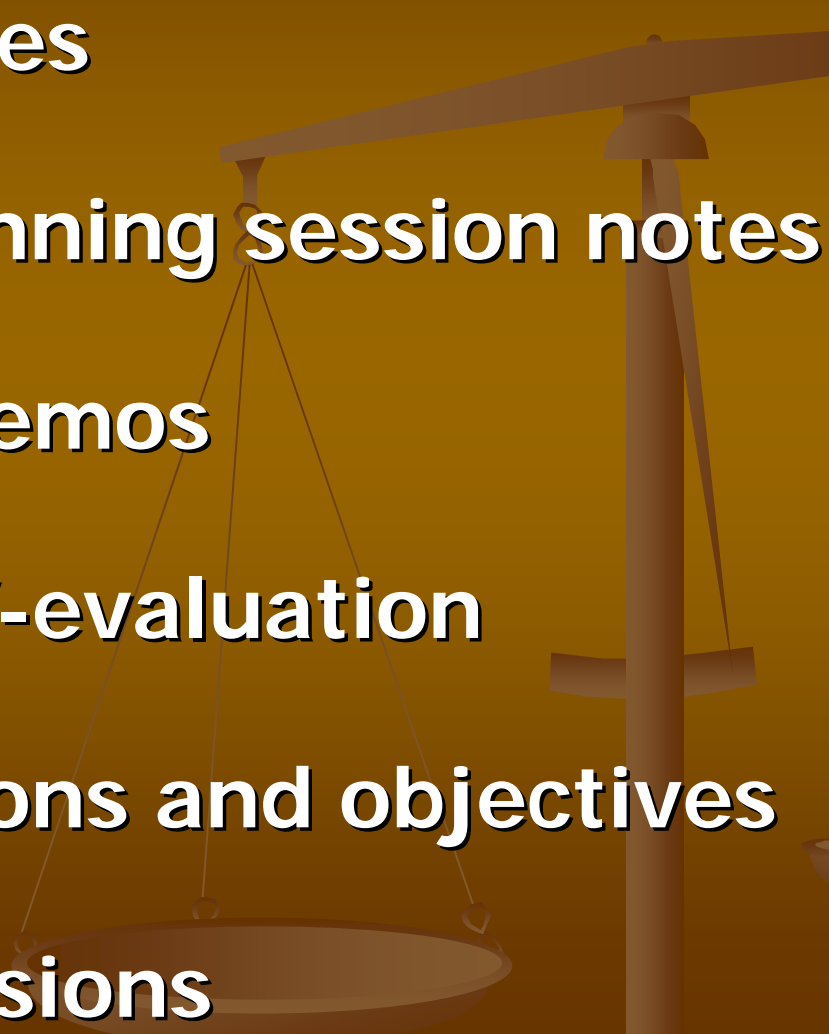


Typical Performance Review Factors

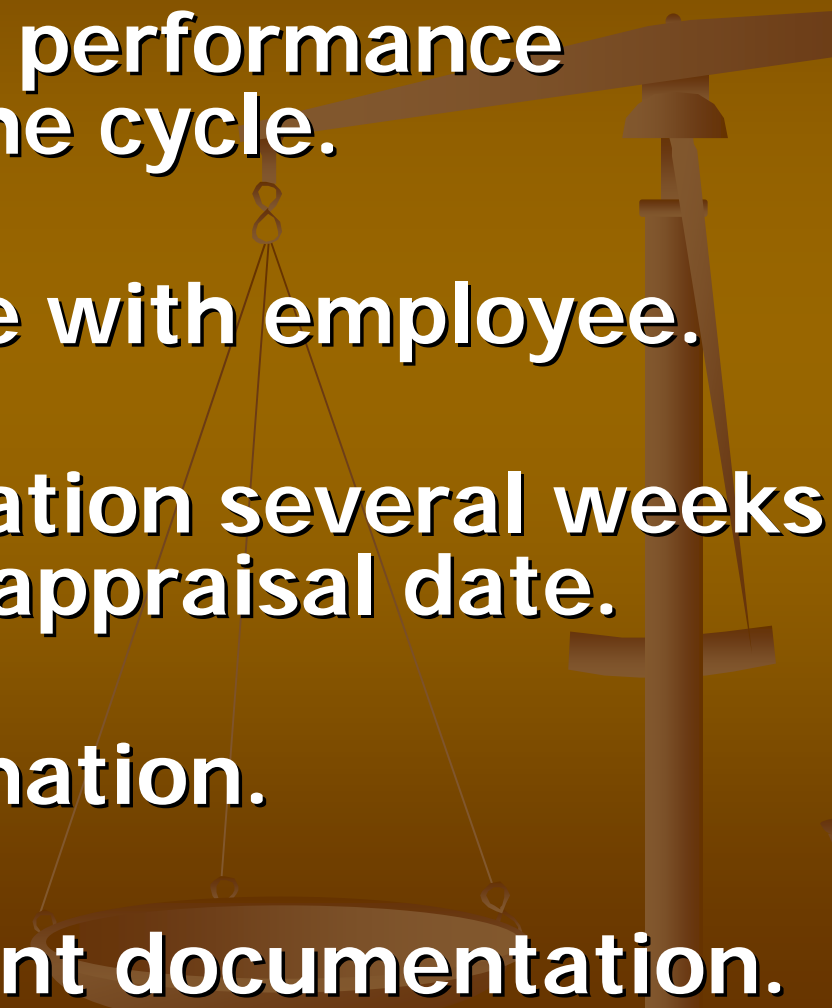
- **Productivity**
- **Quality**
- **Dependability**
- **Team work/communication**
- **Applied job knowledge**



Performance Evaluation Documentation

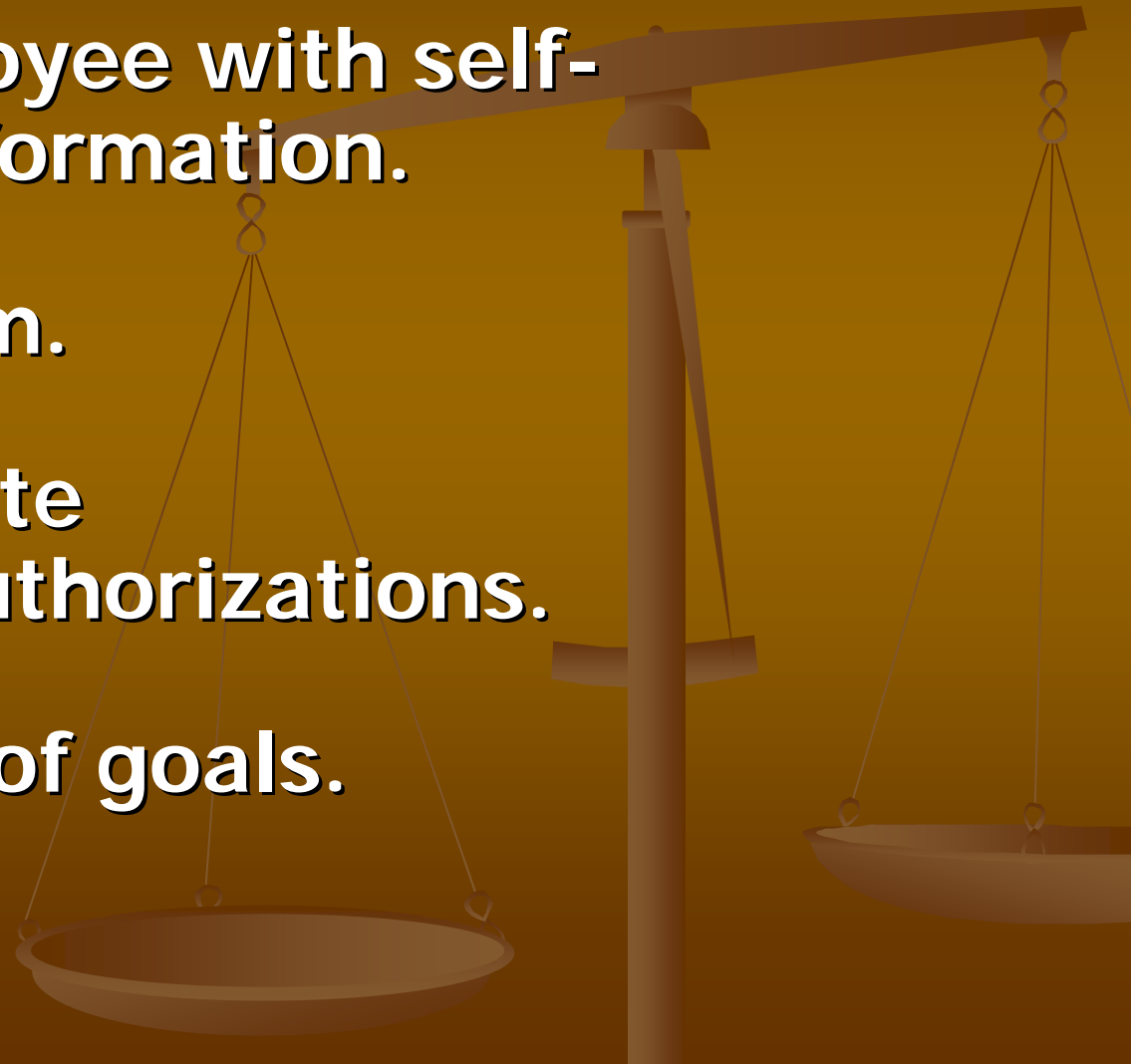
- Anecdotal notes
 - Coaching/planning session notes
 - Confirming memos
 - Employee self-evaluation
 - Prior evaluations and objectives
 - Follow-up sessions
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Preparing for the Evaluation

- Keep track of performance throughout the cycle.
 - Set date/time with employee.
 - Begin preparation several weeks ahead of the appraisal date.
 - Gather information.
 - Other pertinent documentation.
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Preparing (cont.)

- Provide employee with self-evaluation information.
- Complete form.
- Get appropriate signatures/authorizations.
- Have an idea of goals.



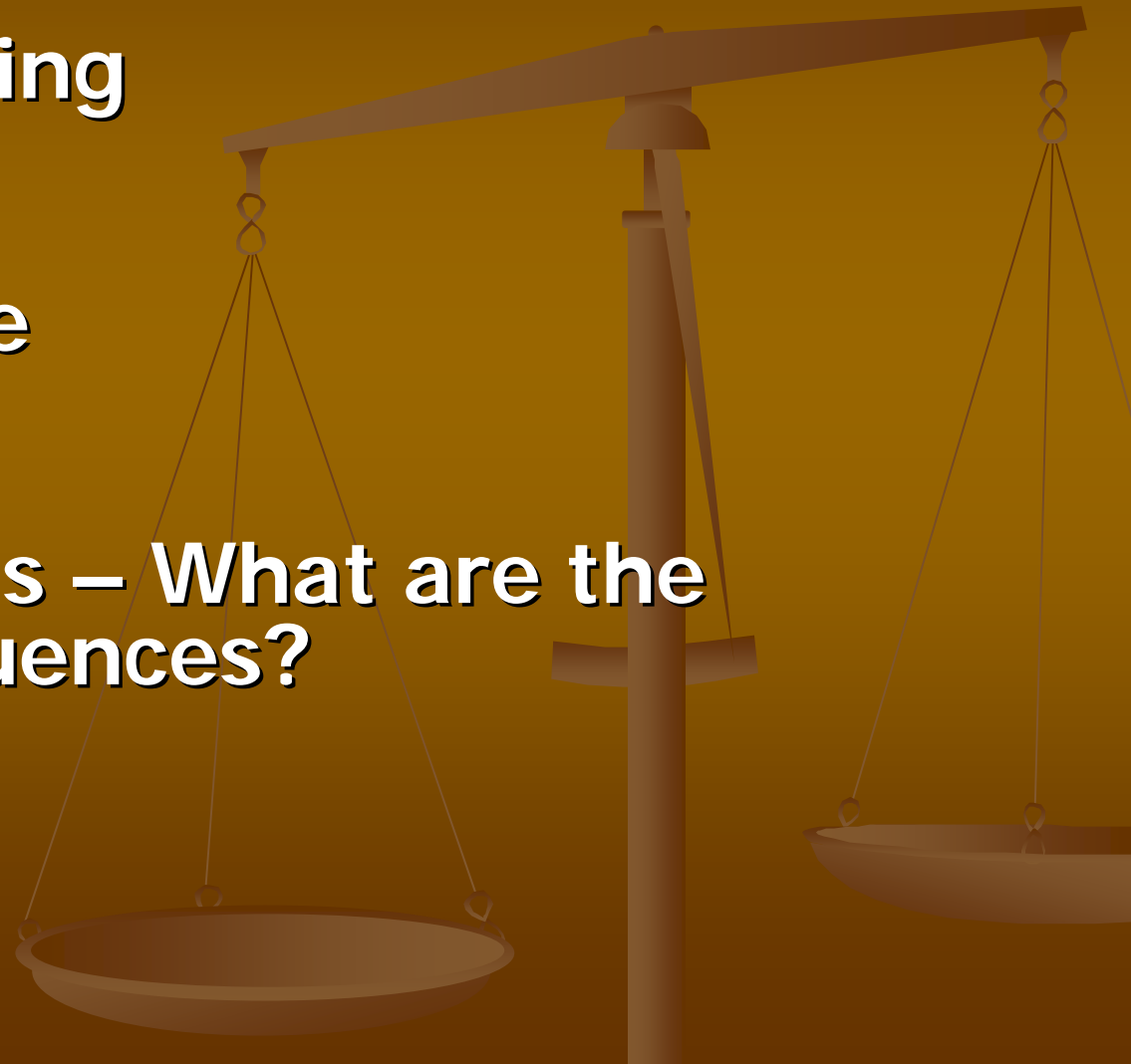
If you're having difficulty
explaining what you want ...
consider this

H Happening

E Example

L Left as is – What are the
consequences?

P Plan

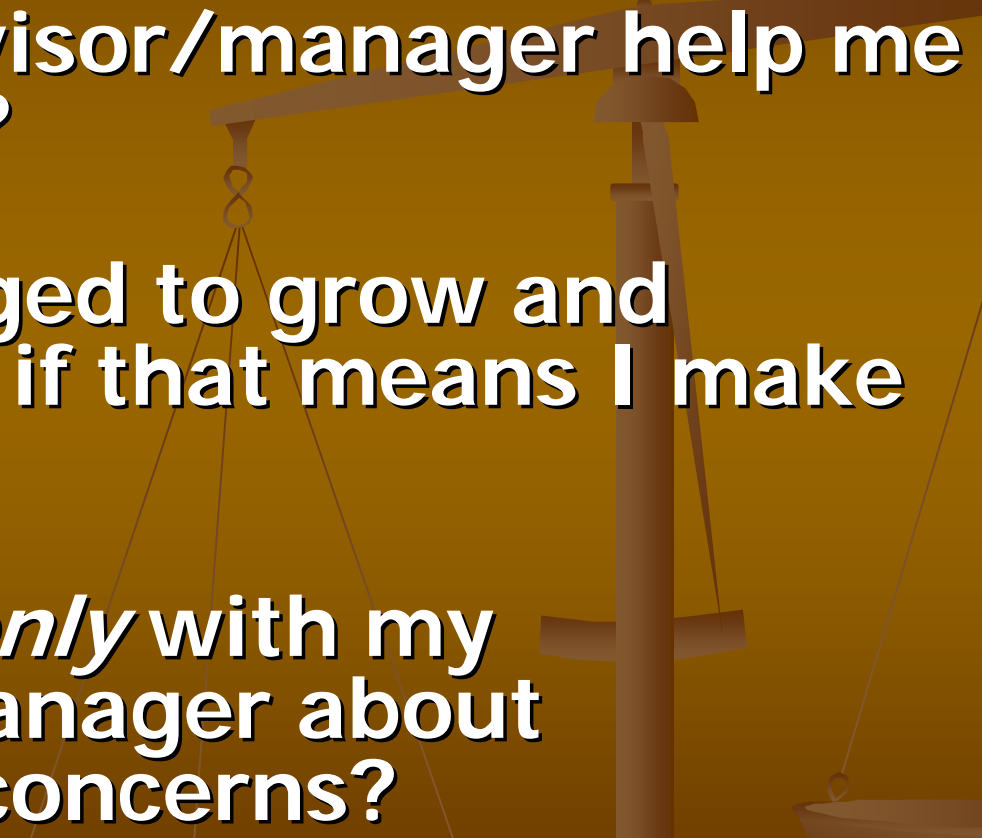


Employee Perspective

- Do I know what I'm supposed to do?
- Do I get good feedback on a *regular* basis?
- Does my appraisal reflect my whole job throughout the review period?

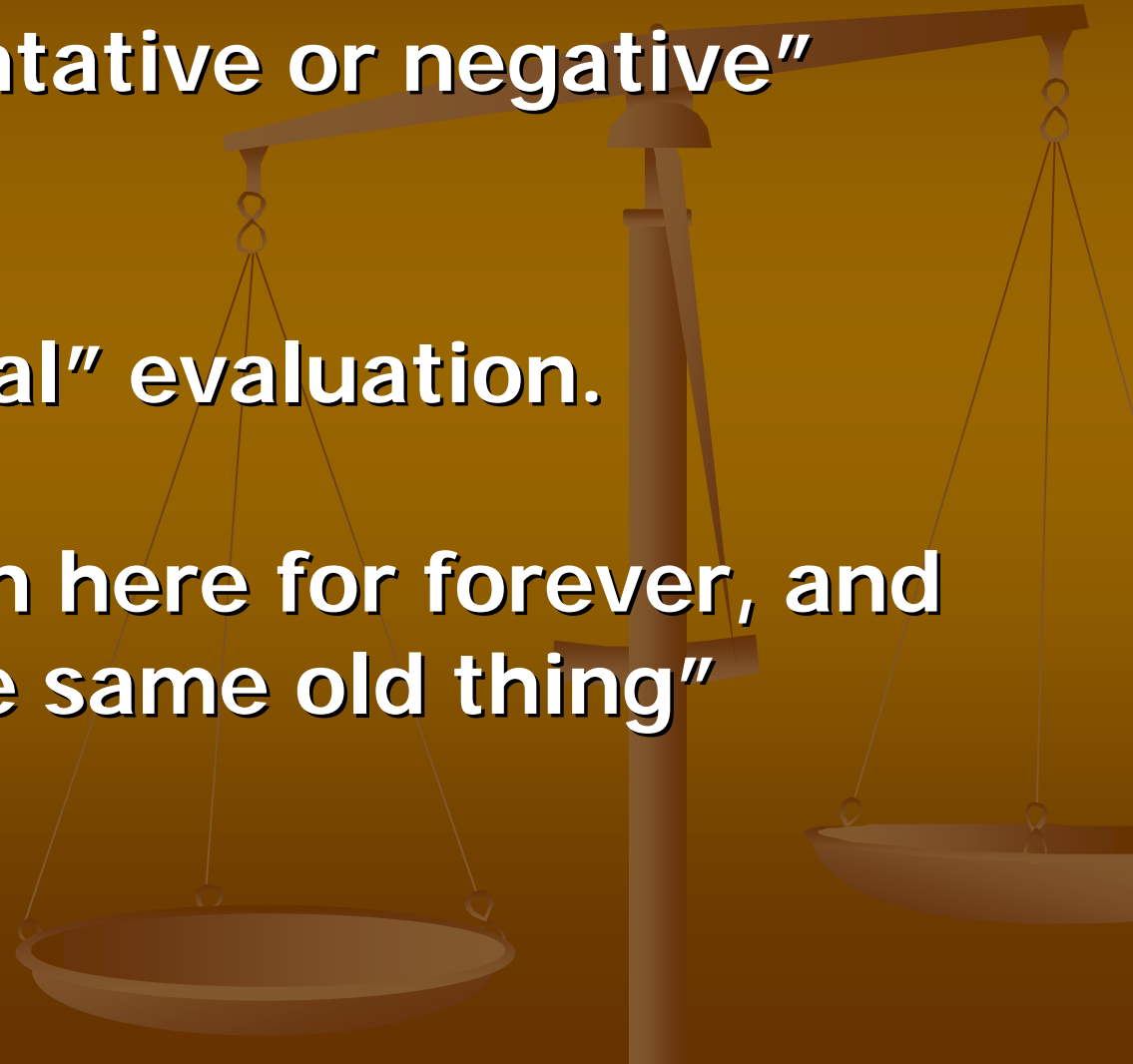


Perspective (cont.)

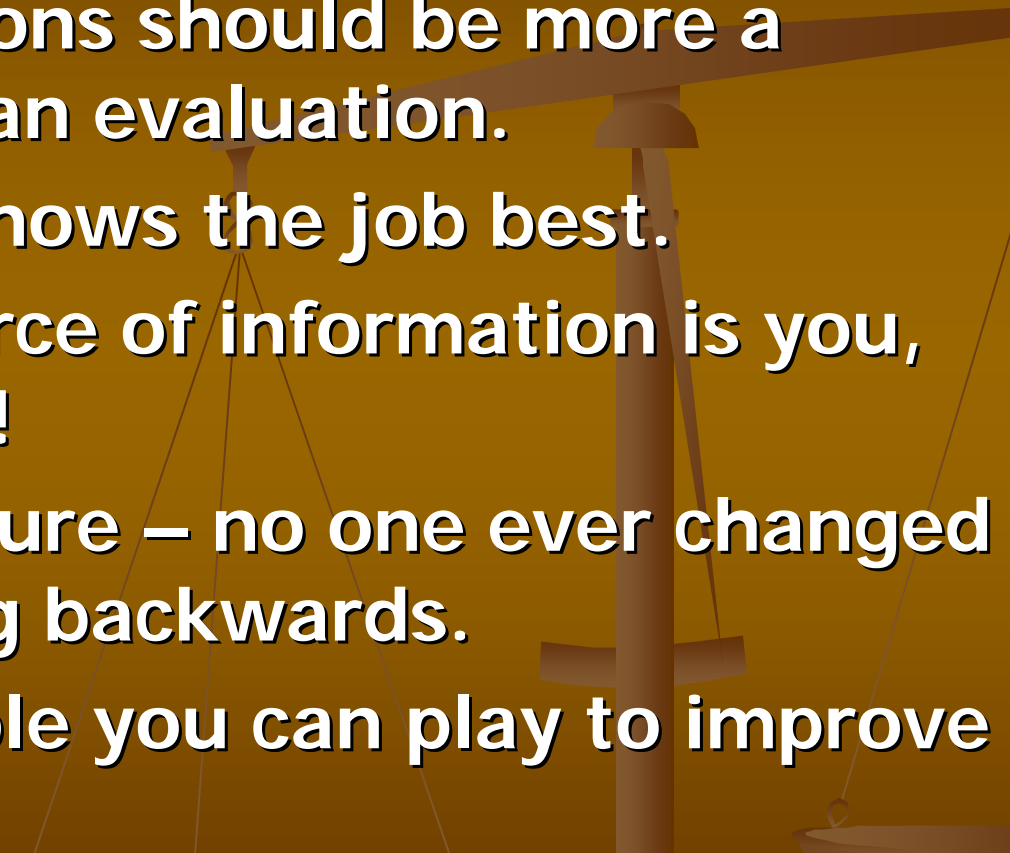
- Did my supervisor/manager help me be successful?
 - Am I encouraged to grow and develop, *even* if that means I make mistakes?
 - Can I talk *openly* with my supervisor/manager about performance concerns?
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Challenging Discussions

- The “argumentative or negative” evaluation.
- The “emotional” evaluation.
- The “I’ve been here for forever, and this is just the same old thing” evaluation.



Important Considerations..

- Review discussions should be more a summary, than an evaluation.
 - The employee knows the job best.
 - If your only source of information is you, then it is biased!
 - Focus on the future – no one ever changed anything looking backwards.
 - Identify what role you can play to improve performance.
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Thank you!

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“Whatever the question...”