

Public Health Competency Based Employee Performance Management – A Guide Book for Managers & Employees

Stage 3: Evaluating Performance

At the end of the performance management cycle the employee and the manager meet to discuss the results achieved by the employee. While it is clear that the manager is responsible for conducting the final review, the process should be a collaborative effort.

Employees should be prepared by having reviewed their accomplishments from their perspective, noting in particular where they feel they exceeded the performance expectations and where there may have been challenges or shortfalls in performance. They should be ready to discuss these challenges and to explore how these may be corrected either through change to the environment or through self-improvement in the next performance development cycle. The more employees participate in objective setting and in the performance review process, the more they will be satisfied with the process, be motivated to improve, and the more they will feel the performance review process is fair.

If progress review meetings have been conducted periodically throughout the year, there should be few surprises for either employee or manager. It should be remembered, however, that the evaluation meeting could still be emotionally charged for both employee and manager. The employee should be made to feel comfortable and encouraged to share their appreciation of achievements over the year and to suggest ways in which their work effort could be facilitated through changes in work procedures, introduction of new methods, equipment or tools, or even a change in the management style of the manager. This will assist the manager in better understanding how they can help their employees do a better job.

Managing the Dialogue – Tips for the Manager

The Environment:

- Prepare a quiet and private room, arranging the furniture so that there are few barriers between you and the employee.
- Focus exclusively on the review and avoid discussing other projects or operational issues. If you need to, set up a different time after the evaluation meeting to handle other issues.
- Allow sufficient time to discuss all issues needing coverage.
- Eliminate distractions caused by telephone, emails, staff meetings, tasks etc.
- Maintain an open posture and avoid crossing your arms.

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Starting the Review

- Communicate what will be kept confidential and what will be shared with whom.
- Start the meeting positively with key employee strengths and/or relatively easy questions to answer.
- Inform the employee that they are welcome to keep notes in the session.
- Proceed methodically through each objective.

Communication

- Learn to monitor and handle your own and the employee's emotions.
- Learn to listen actively, and do not interrupt. Employees have a much better evaluation review experience if they believe their manager is empathetic and understands them.
- Refrain from asking questions that are leading, irrelevant, excessive or poorly timed.
- Use open concrete questions that begin with “what, how, when, where, who”.
- “Why” questions should be used cautiously, as they tend to be more threatening to people because they ask for justification. Their tone suggests judgment, disapproval or embedded advice.
- Tailor your language to the receiver.
- Avoid jargon as it can mean different things to different people.
- Be assertive - communicate openly and unambiguously.
- Focus on the problem, and do not personalize the issue. Behaviours are not attitudes. You need to describe the behaviours, their impact (on you, the team, the project, the work environment, the clients etc.), and your expectations.
- Maintain the employee's self esteem by making them accountable for their actions and for resolving issues.
- Refrain from jumping to conclusions or pushing for an immediate solution. Allow the employee to explain or express their viewpoint.

Closing the Review

- Summarize the performance review conversation to recap what was discussed.
- Allow the employee the opportunity to ask any other questions and check they are satisfied they have been able to air any issues. It is important that they feel they have been listened to.
- Thank the employee for their performance efforts (reiterate their strengths) and encourage them to keep up the good work, emphasising their value to the organization.
- Schedule the next review meeting and let the employee know that you are available to provide support and feedback at any time.

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Potential Evaluation Pitfalls – Tips for the Manager

Errors in evaluating employees

- Not periodically recording performance information so that it remains fresh and timely at evaluation time.
- Using your global evaluation or impression of an employee to make objective specific ratings for that employee.
- Giving more weight to events that occur closer to the evaluation period. This is why it is important to record performance information throughout the year
- Being too lenient when evaluating an employee. Managers may be lenient because they like an employee or want to be liked.
- Giving an average rating to all or most employees. This tendency often stems from lack of time or uncertainty about an employee's performance.
- Relying too heavily on the first impression they made of an employee, especially when contacts are few and far between. Regular and constructive feedback help fight this tendency.
- Giving more favourable ratings to employees they deem similar to themselves.

Communication Pitfalls – Tips for Managers

Performance evaluations can be stressful for both the manager and the employee. It is important to recognize this and to avoid the escalation of occasionally tense situations by listening attentively, showing empathy, and maintaining a genuine interest in employee development.

If an employee becomes upset, allow them to recover their composure and continue when you can. Be sympathetic if tears are genuine, but be wary of tears designed to detract you from your feedback. If the employee has stopped listening, stop the meeting and set a date to finish the review as soon as possible.

Use the **Performance Management Planning and Evaluation Tool** and the **Performance Management Checklist for Public Health** to help you with your performance evaluation.