Writing Performance Evaluations: Six Steps to Success

#1 – Prepare for the Task

- Review job description
- Gather performance documentation
- Obtain attendance record
- Make notes on each *Performance Appraisal Part B Category* (Work Performance, Attendance/Reliability, Customer Service, Initiative/Productivity, Teamwork & Interpersonal Skills) and *Goals*
  - Think about the entire appraisal period
  - Don’t start writing from just a mental outline!

#2 – Avoid Major Evaluator Errors

- Overly positive evaluations
- Overly negative evaluations
- Uniformly neutral evaluations: an evaluation that does not show the strengths and weaknesses of the employee. When the employee is assessed by “central tendency,” he/she is just a straight “3” in every performance category. This may not be accurate and may show a lack of attention to the evaluation by the supervisor. (If this should accurately reflect performance, make sure your evaluation remarks support that.)
- Single event evaluations
  - Halo/pitchfork effect: meaning that the employee is evaluated for the whole year based on one “very good” or “very bad” deed or accomplishment.
- Most recent event evaluations: an evaluation is written in terms of the most recent performance rather than reflecting performance throughout the assessment year. Again, making sure the evaluation covers the entire year this is another reason for preparing notes before you begin.
- Other Common Rating Errors
  - Carry-over: an evaluation is written in terms of the most recent performance rather than reflecting performance throughout the assessment year. Again, making sure the evaluation covers the entire year this is another reason for preparing notes before you begin.
  - Incentive: ratings higher or lower than deserved with the purpose of making the employee work harder in the future.
  - Central tendency: rates everyone the same.
  - Guilt by association: ratings based on group affiliation rather than individual performance.
  - Compatibility: ratings based on friendship or lack of friendship with the employee.
Caution: Inflated Appraisals Can Affect
- Appraised employee
- Other employees
- The organization

#3 – Write with Concentration and Focus
- Make writing the priority task
- Start with a clear head
- Limit interruptions
- Avoid procrastination
  - Waiting until the last minute makes meeting the deadline the priority task

#4 - Start Anywhere on the Evaluation
- Start with what you know
- Start with the section that inspires your greatest confidence
- Skip around – It’s not against the rules!
- Write to evaluation completion

#5 – Be Specific and Focus on Behavior
- Describe specific challenges and actions taken
  - Name a specific problem or goal
  - Tell what was done and accomplished
  - Identify the individuals or groups with whom or for whom the work was accomplished
- Describe recent education and training completed
- Include special assignments
  - Work details, task forces, and committees
- Avoid “laundry lists” of responsibilities, duties, and activities
- Exclude statements of beliefs and philosophies
- Use examples, but not the same ones repeatedly
  - Vary examples in different categories
- Provide context
  - Describe climate or environment surrounding the situation, problem, or goal
- Include outcomes and results
  - Add numerical data, if possible
- Use clear, direct language

#6 – Read, Revise, and Edit
- Refine ideas, streamline wordiness, and delete redundancies
- Check for accuracy in spelling and grammar
- Check for alignment of assigned evaluation score and narrative
  - Does the narrative support the rating?
- Get a second opinion
The Appraisal “Interview”

- **Before the Session**
  - Talk to your employees about
    - The UF Performance Appraisal Form
    - Appraisal time frame
    - Five evaluative performance categories
    - Five ratings
    - Self-evaluation and supervisor evaluation

- **Before the Session**
  - Provide employee with Self-Assessment page to be completed before appraisal session.
    - Ask the employee to return it to you before the appraisal session or to bring it to the session—your choice.

The Appraisal Session

- **Choose a convenient time**
- **Choose an appropriate location**
  - Provides privacy
  - Is away from the immediate work area
- **Inform employee of the purpose**
- **Plan your meeting**
- **Begin and end with a positive**
- **Emphasize growth and development**
- **Encourage open discussion**
- **Avoid joking**

Training

- UF Training & Organizational Development offers the course **SCS012 Writing Performance Appraisals**. This session focuses on specific strategies to help improve a supervisor’s writing of evaluations.