Writing A Performance Evaluation

There are two parts to the evaluation process:
- A written performance evaluation created by the manager which documents accomplishments and performance feedback.

- A verbal conversation, or performance review, about the performance between the manager and the employee to align on feedback, expectations, and next steps.

The written performance evaluation should recap the year. This is a time to recognize the employee's achievements, share feedback on what they did well, and discuss what needs to change, improve, or adjust in the coming year to further develop in their role and improve performance.

The performance review shouldn't include any "new news" or be a surprise in any way because it is just one of many touchpoint conversations the manager should have with their team member about performance and development throughout the year.

There are six keys to writing an effective performance evaluation:

- #1 - Recognize the impact of the evaluation on your employees and your department.

- #2 - Share both the big picture and the specific details about goal achievement and performance.

- #3 - Carefully craft your words to be clear and concise.

- #4 - Use the review of past performance as a development opportunity for the future.

- #5 - Ensure your ratings accurately reflect performance and contribution.

- #6 - Use your resources including the templates, tools on the performance management portal and, when needed, your HR business partner to support you in the process.

Tip #1: Recognize the Impact on the Employee & Department

Employees at all levels of performance and experience want to know where they stand. The end-of-year performance evaluation is the formal opportunity in the cycle to share that with them. Feedback drives motivation, engagement and enablement. It also opens the door for employees to share their thoughts, frustrations and career aspirations.

To ensure the performance evaluations are impactful:

- Take notes all year long - keep a running journal each year of specific times that an employee does something really well or maybe something poorly.

- Check in with the colleagues that your employees work closely with for feedback and include that in the evaluation.

- Meet with your team prior to them writing their self-assessment and share the type of input that is most valuable to you as input to their evaluation.

- Share the timeline and expectations around the performance review process.

Tip #2:
Share Both the Big Picture and the Specific Details

Ask yourself:

- How do I want the employee to feel?

- Do I have all of the information I need?

- Have I collected enough tangible pertinent examples?

- Do I have a mix of positive and constructive feedback? (Both are important for development.)

Review

Big picture

Specific, Supporting Details

Tip #3:
Carefully Craft Your Words

When writing a performance evaluation, it's important to carefully craft your words to be clear and concise. Keep in mind, the employee will read the evaluation through his or her own filter or lens. Additionally, the evaluation is a long-term record of achievements for the year. It may be read by future managers or others. It could even be pulled into evidence in a legal situation. So, the words you choose are important.

The SBI Framework is an effective approach to sharing feedback.

S	B	I
Situation	Behavior	Impact

Tip #4:
Use the Review of Past Performance as a Development Opportunity

The value in a performance evaluation is not only to provide a record of achievement for the previous year but also to use that information and feedback to shape future performance.

As you write the review, ask yourself:
- What messages are my comments communicating to the employee?
- Is it clear what behaviors I want to see stop, start, or continue as we move forward?
- Is my tone consistent with how I feel about the person's performance?
- Are my comments consistent with the rating I have provided the employee?

Tip #5:
Ensure the Rating Reflects Performance and Contribution of the Team Member

Consistently Exceeds	Frequently Exceeds	Successfully meets	Partially meets	Does not meet
☐	☐	☐	☐	☐

When writing a performance evaluation, it is important to ensure the rating selected accurately reflects the person's performance.

Each of these ratings is fully defined on a [rubric scale.](#)

It's important for managers to use the ratings in alignment with the definitions and ensure their ratings are calibrated across team members, given the ratings are an input into reward decisions.

The core standard of "fully meets" describes a competent, valued contributor. It is expected that there will be staff at each of these additional ratings, but the majority should be performing at "fully meets" expectations.

As you look at all of the evaluations of all of your teammates together, ask yourself:

- Have I used the whole set of ratings?

- Are my ratings aligned with the definitions defined on the rubric?

- Are the ratings equitable to the contribution each team member has made?

- Can I clearly articulate why a rating is higher or lower than fully meets expectation, and finally

- Are my ratings fully objective and free of bias impact?

Team Changes

A common question is how to handle changes to the team. Review the guidance below.

New Manager to the Group

Follow these best practices if you are a new manager to the team and were not involved with the goal-setting process:

- Obtain copies of previous performance evaluations to learn about previous years' goal progress and development opportunities to consider. Compare previous evaluations with your thoughts.
- Review the goals set with the previous manager.
- If the manager is still at Northeastern, get input from the previous manager or co-write and deliver the review.
- If the manager is not available, get input from others such as your manager, project leaders, or colleagues who work regularly with the employee.

New Employee

Follow this approach if the employee is new to Northeastern:

- Conduct a 90-day probationary period review.
- Use the End of Year Evaluation to help new employees understand the performance management process.
- Recap their time from the date of hire up to the evaluation.
- Adjust goals as needed.

New Employee to the Team

Follow this approach if the employee is new to your team but not new to Northeastern:

- Have the previous manager write and deliver a partial evaluation for the time spent before the move to your team.
- Have a conversation with your new team member about performance so far and adjust goals as needed.