

Performance Evaluation Writing Guidelines & Examples

Detailed performance evaluations that offer examples to support statements are more meaningful to your direct reports and will help the Review Team determine if the proposed performance level rating is appropriate. As you draft the performance evaluations for your direct reports keep these guidelines in mind:

- Be specific and provide examples
- Be objective and provide facts instead of opinions
- Be professional
- Consider the entire evaluation period
- Avoid the halo/horn effect (defined as a tendency to allow one's analysis of performance, to be unduly influenced by an unfavorable (horns) or favorable (halo) personal impression or based single incidents in the evaluation period)
- Evaluate performance as it relates to the individual's position, as opposed to their performance as it relates to others

Instead of...

Cynthia works well with her co-workers but seems to struggle with meeting her case load whereas Bill has exceeded his goals. Cynthia works hard but recently has developed attendance issues. This may be because of personal issues at home. Cynthia has a good attitude, overall, and I enjoy supervising her. Looking forward, Cynthia should look for ways to reach her quotas and develop a plan for limiting absences.

Consider...

Cynthia has demonstrated team work by being professional in her interactions with her co-workers, approaching conflict in a constructive manner such as when she addressed the issue of cleaning out the refrigerator with her office mates (she identified and discussed possible solutions with this group and, as a team, they came up with a cleaning schedule and guidelines for use of the refrigerator), and being flexible with office coverage (Cynthia assisted as often as able to provide front desk coverage when Bill was out unexpectedly).

Cynthia has completed 70% of her case load. She has developed a list of partners in the last 4-months that has helped her to reach this number. Prior to development of this list Cynthia had reached 20% of her quotas during the previous 8-months. Cynthia should continue to develop partnerships to maintain a consistent schedule throughout the year. Her recent efforts and success indicate she is fully capable of reaching and exceeding her assigned case load if she maintains these efforts. Cynthia has submitted her programming paperwork on time and as directed. Her eDoc entries are completed correctly and on-time.

Cynthia and I have discussed recent frequent tardiness. Based on our discussions an adjustment in Cynthia's daily schedule has been agreed upon. I expect this will significantly reduce this issue.

Early last year Cynthia offered suggestions and comments about changes to the department filing system that were implemented and, as a direct result, has reduced delays in filing and mis-filing. Her continued effort to improve her work, as demonstrated above, and that of the department, her flexibility, and her positive attitude have been reasons I enjoy supervising her.

Instead of...

Stanley is disconnected from his peers and people in the office avoid him due to his attitude. He has not kept his Outlook calendar updated I've had to remind him repeatedly to make sure time off entries in EBS and his Outlook calendar reflect the same time off. Despite this Stanley has increased youth participation and volunteer recruitment in his county by 7%.

Consider...

Stanley has exceeded his youth participation growth by 3% and has increased the number of volunteers in his county by 7%. He's accomplished these numbers by maintaining past relationships but has also identified additional groups to tap as volunteer resources, such as West Coast Youth writers, through attending community meetings. Stanley has prepared and delivered training sessions to his co-hort on developing relationships to yield additional volunteers sources.

While Stanley can effectively communicate ideas and suggestions in these larger group settings without concern, Stanley and I have been working to develop a plan for improving his daily interactions with his co-workers. In June, a mailing was delayed because Stanley had been abrupt in his communications with the support person when she asked a question. After looking into this further and discussing with Stanley he acknowledged that when he feels pressure he may become short with others and he has noted that his co-workers will sometimes avoid him because of this issue. Having discussed this, Stanley has developed a plan to improve his working relationships. The results of this plan are not yet determined because the issue was only identified a short time ago and Stanley's plan has not had time to yield results.

In the last year, Stanley and I have discussed the expectation that his Outlook calendar is kept up to date and that the time off entered on the calendar reflect the time entered in EBS and vice versa. This continues to be an issue despite being addressed several times, the most recent emailing being sent to Stanley on January 20, 2018. It is expected that Stanley correct this issue immediately. He should identify resources to assist him in meeting this requirement and letting me, as his supervisor, know if he needs additional support such as training to meet this goal.

Instead of...

Aiko is a star on our team. She consistently meets and exceeds her case load. Her teammates love working with her and she is considered a go-to person. I don't know what we would do without her positive attitude and the support she offers to the entire group.

Consider...

Aiko is an asset to the MSU Extension team. She has exceeded her case load by 30%, maintains her calendar as directed, completes her paperwork on time and correctly, and I've never had to address an issue with her eDoc entries.

Additionally, Aiko is a go-to person in our office. Since she has experience with Word and mail merge and she has taught others how to use this program. When the storage room needed to be cleaned out and rearranged for a move to a smaller space she volunteered to lead this effort. She coordinated a plan and the effort of her co-workers to complete this project. These are just a couple of the examples of how she has worked to support the organization (reduction of time to prepare mailings, taking leadership of projects, etc.).

Working with Aiko is a positive experience. Even when she has voiced disagreement during a discussion, it has been done respectfully and she is open to considering contrary views. Even when she disagrees with a discussion, she supports the decision when discussing the issue with her co-workers. The most clear demonstration of this came following the communication of dual

requirements in the department which expanded how performance is evaluated (moving to both participant and education events vs. only number of participants). There was concern about this move and Aiko came to me to discuss and voice concerns. Following this discussion, I overheard Aiko discussing the issue with a co-worker and highlighting the positives of the decision.