

How to Prepare for a Performance Evaluation

Document Your Achievements

By Christine Martin

Performance evaluations can be uncomfortable for employees and employers alike. But, as an employee, you can head off that anxiety by forming your own agenda for the meeting. Arm yourself with a portfolio of your accomplishments and you may feel more in control than you expected. Here are some steps to take before the big event.

I. Find out how, when, by whom, and on what you will be evaluated.

Of course, your first course of action may be to talk to your co-workers who have already been through the process. Getting the following documents from your employer also may give you some idea what to expect.

- A. Job description. Ideally, your job description outlines your duties and the standards against which you will be judged. But don't be surprised if it is outdated. You may have to update it, rewrite it completely—or draft your own if none exists. So be prepared to document what you do. Can't get started? Begin by answering this question: What is different or better because I am on the job?
- B. Employee handbook. You may have received an employee handbook upon employment. It may spell out:
 1. how often reviews are done (e.g., annually, quarterly, etc.); and
 2. what kind of reviews are done (e.g., 360-degree peer review, immediate supervisor review, or some combination thereof).
- C. Blank review form. Get a copy of it in advance so you know what to expect.
- D. Past reviews, if you've been on the job long enough to have them. See what comments were made previously. Have you addressed them? Have you taken steps to meet any goals set out?
- E. Employment agreement, job offer letter, or anything else that addresses your job evaluation or salary review. For example, if you were promised an earlier-than-usual salary review when you were hired, find the document that made that promise.

II. Build a file of your accomplishments.

Include anything that is tangible, measurable, or specific. Patty Marler and Jan Bailey Mattia, authors of *Getting a Raise Made Easy* (VGM Career Horizons, Lincolnwood, IL, 1996) suggest keeping a "job journal" to document your victories throughout the year. For example, you may wish to include:

- A. Thank you notes from customers, co-workers, suppliers, or supervisors.
- B. Industry awards you have won.
- C. Articles you have published.
- D. Sales charts or other materials that indicate how you have increased revenue.

- E. Anything that indicates that you have saved your employer money.
- F. Evidence of any other project you successfully completed or oversaw. For example, did you:
- Coordinate a successful event?
 - Train a new customer?
 - Develop training materials for a new product?
 - Start a capital campaign?
 - Resolve a sticky budget or personnel problem?
 - Take a course or seminar that gave you new skills?
 - Develop a program to improve employee moral?

If so, do your accomplishments translate into something specific and measurable? For example, try to quantify the number of:

- customers served;
- items cataloged;
- employees supervised;
- users trained;
- community groups met with;
- cultural programs held; or
- dollars raised or saved.

Gather your material and be prepared to share it with your employer. He or she also may be keeping a performance log to help him or her write a better evaluation. Be prepared to compare notes. If nothing else, bring your portfolio to the meeting and use it as a prop to help assuage any anxiety. Better yet, review it, so you are prepared to discuss specifics.

III. Identify any broader issues you would like to discuss.

Karen McKirchy, author of *Powerful Performance Appraisals: How to Set Expectations and Work Together to Improve Performance* (Career Press, Franklin Lakes, NJ, 1998) suggests that employees prepare for a performance evaluation by asking themselves:

- What critical abilities does my job require?
- What were my special accomplishments during this appraisal period?
- What do I like about my job? What don't I like?
- What goals or standards didn't I meet?
- How could my supervisor help me?
- Is there anything that the organization or my supervisor is doing to hinder my progress?
- How can I become more productive?

- Do I need more experience or training?
- What have I done since my last appraisal to prepare myself for more responsibility?
- What new goals or standards should be applied for the next appraisal period? Which old ones should be discarded?

Use these questions to identify issues or problems that you would like to discuss at your annual review, or at any meeting with your supervisor. Your boss may want to know how he or she can help you do your job better. So use your review to discuss items of interest to you, not just your employer's needs. For example, you may wish to bring up:

- your personal career objectives;
- any problems or concerns about your present job;
- your job performance since your last review; and
- any goals for improving performance and productivity.

IV. Day of the evaluation: your employer may be nervous, too.

Remember, employers dislike evaluations as much as you do, at least judging from the number of books written to help them through the process. But your employer needs you (and your feedback at evaluation time) to help her identify training needs and to retain good employees. In fact, McKirchy suggests that employers and employees use the annual review meeting to complete an evaluation form together. She suggests that the employer open the dialogue by asking the employee how he rates his own performance. Believe it or not, according to McKirchy, who is writing for an audience of employers, 90 percent of employees rate themselves too low. So don't be afraid to discuss your performance. Chances are good that your employer is more satisfied than you think. A discussion prompted by your own self-analysis may result in a cooperative attitude of "where do we go from here?" instead of an uncomfortable confrontation.

- What to expect from the evaluation. According to McKirchy, an employee should expect to receive a copy of his or her evaluation, which may include:
- future performance goals;
- a plan to achieve the goals (e.g., a change in employee or employer behavior, additional training, additional resources, or additional support from other staff); and
- new responsibilities that might be pursued, including possible promotions.

V. Think of performance appraisal as a cycle.

McKirchy suggests that employers and employees alike think of performance appraisals as a cycle that includes:

- job expectations,
- performance,
- appraisal, and
- discussion and plans for improvement.

As an employee, you may wish to use this cycle to ask for feedback outside of your formal review. There's no point in letting problems fester for months when a little initiative may nip them in the bud. Keep the cycle in mind and your annual performance evaluation can be a happy "no surprises" event instead of an annual departure from regular operations.

The E-Learning Clearinghouse Database

In 2004, WebJunction received an Institute of Museum and Library Services (IMLS) National Leadership grant to create a database of Web-based educational development for library staff and information professionals. The database is currently in development and will be launched in Fall 2005.

The E-Learning Clearinghouse will provide a searchable database of programs and courses offered by ALA-accredited graduate schools, community colleges, and regional service providers throughout the US and Canada. Potential students will be able to discover what type of online education is available, when, and at what cost - and then go to the education provider's Web site to enroll.

WebJunction has made a spreadsheet available for download.

<<http://webjunction.org/do/DisplayContent?id=10928>>

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