Guide to Getting Ready for your Evaluation

If the mention of “performance review” makes you a little nervous, you’re not alone. Many people get unnecessarily anxious when it comes time for the common annual evaluation. But rather than approaching this with an overblown sense of dread, you can view it as an opportunity. Along with receiving feedback on your past year’s performance, you’ll also have a chance to brag about your accomplishments, address shortcomings, ask questions, and get direction for the upcoming year.

If you are prepared to make the most of this time, it’ll be a relatively painless process; in fact, it might even be eye-opening and super insightful.

The purpose of this guide is to help you:

- Recognize the need to review your performance in readiness for your evaluation.
- Understand the need to review your behaviors in readiness for your evaluation.
- Learn various ways to provide evidence for your evaluation.
- Identify any development and career aspirations.

In order to make the best of this time, you need to be prepared. It is important to know that your evaluation is linked to the university’s business objectives and have been filtered down to your college or department, then on to you as shown in the model:

Individual objectives are what you achieve to ensure the overall strategic objectives are met.

Individual behaviors are how you meet your objectives in a way that supports the university’s values.

Evaluations can sometimes be linked to pay and this makes it even more important that you prepare thoroughly.

And this is all merged by design into goal or strategic alignment – where we are all working jointly working toward Virginia Tech’s stated goals.

Thorough preparation means you are prepared to give the best account of yourself and of your worth to the team.
Getting Ready for evaluations means you should:

1. Understand the key elements of Evaluation Preparation.
2. Review your performance and behaviors.
3. Gather evidence and look to the future.
4. Identify development needs and career goals

**Review your Performance**

Look at the goals in your performance plan. Make sure these are still up to date so that you know exactly what your manager is reviewing your performance against. Also look at any notes you have made in one to one meetings during the year that give you feedback on your performance and suggested areas for improvement.

Ensure you have detail on your main successes and achievements since your last Appraisal/one-to-one. Make a note of evidence and data that support this, together with third party feedback (if available). This will help support you’re reasoning behind your self evaluation. If needed seek feedback from a wider range of people that you deal with (colleagues, other teams and customers etc.) to help with your evidence. Consider the following points to give you specific pieces of evidence to help with your performance review:

- Targets are quantifiable results to be attained using measures such as output, throughput, sales, levels of service delivery, cost reduction, reject rates.
- Tasks or projects are a distinct piece of work to be completed by a specific date to achieve defined results.

Next list the aspects of your work that you have found the most satisfying throughout the year. List the main challenges, frustrations or disappointments. For each of these, identify the steps you have taken to resolve them and/or suggestions for improvement.

Consider the feedback you have received from your manager during the year and therefore expect to have reinforced during the discussion.
Are there reasonable changes to your job that you could suggest, or the way you do it, that would make you more effective and your role more interesting?

What aspects of your job play to your strengths?

Is there an opportunity to develop your role in line with these strengths?

How does your role impact on others in the team?

**Review your Behaviors**

Review the Principles of Community, Business Conduct Standards, any behavioral expectations communicated at the team level and ensure that you have a good understanding of what is required in your role.

Look back over any feedback you have received on your behaviors over the last year, consider changes you have made as a result of this feedback and any evidence you have to support the change.

- What are your strengths and areas for development?
- Have these changed over the last year?

**Review your Team Skills/Capabilities (where appropriate)**

Review your Team/Functions Capabilities. These are a set of capabilities that have been identified against your team or workgroup. If this applies to you, consider the following:

- Where are you against these capabilities?
- What are you strong on/not so strong on?
- Review your Development/Learning against these capabilities.
- How has it progressed?
- What have you done differently as a result?
- What skills or knowledge do you apply as part of the team/workgroup that are not used in your regular job but you would wish to use?

**Gather Evidence into a Summary**

Following specific examples and evidence that you have completed against your objectives, behaviors, capabilities along with feedback you need to think about bringing this all together.

Your summary can be a quick overview of how you feel you have done against your established goals and competencies. From your summary complete a more detailed overview of the year and how you feel you have performed by way of an optional self-evaluation.
Plan the Year Ahead

Drafting Goals and Objectives

Your next year’s goals should cover the major areas you have responsibility and also ensure that the team that you work in is able to deliver their element of the departmental goals and objectives.

Draft a manageable number of goals for the coming year (maximum five). These can be a mixture of short- and long-term, innovative and routine objectives but should all have a clear link to business success.

Do not fall into the trap of just setting out your job description or having objectives that can all be achieved within a few weeks.

When setting your goals you should also consider the following:

Look at your job description. Is it up to date? In what ways has your job changed? Think about how you are currently spending your time? How should you be spending your time in order to achieve the business priorities?

These future goals should be: **Specific, Measurable, Achievable, Realistic, Time bound**

Development Needs

Consider what development will help you in your role or even future roles. Provide a summary of development priorities for your current role, including suggested solutions, which can form the basis of individual’s development objectives in their Objectives plan for next year.

Drafting Development Objectives

When writing your personal development plan, be clear about:

Your development needs: What should you be able to do differently? Under what conditions? How well must it be done? Business outcomes: What are you hoping to achieve? What impact will the learning outcome have on the business, or you personally?

The most appropriate development method: We all have different preferred learning styles. Discuss your preferred method of development with your manager and be open to other suggestions you might not have been aware of.

- Do you prefer to learn by actually doing things yourself?
- Do you prefer to learn by observing others?
- Do you prefer to learn by looking at ideas and theories?
- Do you prefer to learn by putting ideas into practice yourself?
Career Aspirations

Consider recording any career aspirations taking into account performance over the last year, readiness for future moves, skills and development requirements.

After your Evaluation

Your supervisor should also be meeting with you to agree your final rating (where applicable).

Sign and print, or ensure you get from your supervisor a written summary of the discussion shortly after the meeting.

Summary

Evaluations are a very important time for most employees. This is the time of year that employees need to organize themselves to ensure they are fully prepared for their evaluation. Evaluations can often be linked to pay and this makes it even more important that you prepare thoroughly with evidence to support your own evaluation.