

Performance Review: A TIP SHEET

Planning

It is true that performance reviews require a great deal of thought and time. As you prepare for performance reviews, keep in mind that they provide an important opportunity for staff to explore the ways and the extent to which their work contributes to your organization's mission. While this process can feel daunting, remember that annual reviews:

- Provide time and space for people to notice what is working and what can be improved upon
- Facilitate planning for the upcoming year
- Are an opportunity to plan for professional development in support of learning, growth, and effectiveness
- Help supervisors and staff pay attention to their relationship and make adjustments as needed

Supervisor/staff relationships are a partnership. While it is important to acknowledge that positional power is an intrinsic part of this partnership, all relationships require both parties to be engaged and invested in one another's success. When supervisors invest time in planning and conducting thoughtful performance reviews they convey their investment in employee success. When staff invest, they convey their commitment to their own success as well as that of the team, the Foundation, and mission.

TIP: There are lots of steps to the review process. When mapping out a plan, be sure to leave enough time at the beginning to collect feedback from peers and direct reports.

TIP: On average, supervisors should plan on up to three hours per review. That includes drafting the review, considering peer and direct report feedback if appropriate, discussing the review with the employee, making final edits or changes.

Peer feedback

You might be wondering: Who should I approach about providing peer feedback?

TIP: Think about who you have worked with over the last year? Whose work have you impacted? Who has impacted your work? Has anyone had the opportunity to observe you in action? It is tempting to only solicit feedback from people who will provide praise. But try to identify at least one peer with who you have a significant degree of trust. Be sure to let that person know that you are interested in their perspective about how you can grow and improve.

Another question: Should I tell the full truth when providing peer feedback, especially if I have constructive criticism?

TIP: First, give some thought to who will benefit from this feedback. Will it make you more comfortable? Is it tied to delivering on our mission? Also, are you seeking behavior change that is more about assimilation than honoring different approaches to the work at hand? (Check out the **Conducting Performance Review: Tips for Managing Bias** handout.) If you are confident your constructive feedback will truly support this person's success and that it doesn't perpetuate White Dominant Culture, be thoughtful and intentional in planning and delivering it. Remember, when providing feedback:

- Approach it with a commitment to the other person's growth and learning
- Pay attention to timing
- Consider whether cultural and identity differences are a factor; is unconscious bias creeping in or does the issue at hand have a meaningful impact on you, the work, constituents, or others. If you are unsure, check in with HR about this.
- Be specific, not general; descriptive, not evaluative
- Name the impact
- Describe what you'd like to see instead
- Check for understanding

Supervisor feedback

People also want to know: Should I tell the full truth when providing supervisor feedback, especially if I have constructive criticism?

TIP: See tip above in **Peer Feedback** section

TIP: The power differential is real. If you are concerned about retaliation but have constructive feedback you'd like to share, please consult with HR.

TIP: Check out the **Conducting Performance Review: Tips for Managing Bias** handout.

Values

Evaluating how my ways of working, or someone else's way of working reflect your organization's values is challenging!

TIP: We often act in ways that are consistent with our personal values without even knowing it. Think about what is important to you personally? How does it show up in your life? Next, look at the list of your organization's values. How do those show up for you at work? Once you have some practice noticing the connection between values and how you behave, you are ready to fill out your self review. You can also apply that thinking to other people; how have you observed their behavior, actions, decisions in the context of your organization's values?

Here are some examples:

Your own reflections

Value = Justice: recognizing, interrupting, and addressing oppression.

How my own ways of working reflect this value: When I noticed that one of my co-workers was being interrupted repeatedly by someone with more privilege, I checked in with that co-worker to acknowledge what was happening. I also pulled the interrupter aside and shared my observation.

Value = Courage: Boldness and braveness promoting new or controversial ideas; learning from failure, caring for one another.

How I could do better reflecting this value: Sometimes I have ideas in team meetings that I don't share because I am worried they'll be shot down. I am going to practice raising at least one of these ideas at a team meeting in the next couple of months.

Feedback for someone else

Value = Leadership: Demonstrating humility, collaboration and sharing ideas to learn from others and to support their growth.

How this person's ways of working reflect this value: I really appreciate the humility you bring as a leader. On a number of occasions I have seen you admit you've inadvertently caused harm to a person with prioritized identities. I am sure that isn't easy in front of your team but it sets a great example for the rest of us.

Value = Dignity: Treating all people with dignity which includes not judging choices others make.

How this person could do better reflecting this value: While you usually treat others with dignity, I remember a time you made a joke about someone else's outfit. It made me uncomfortable and I wish I had said so at the time. I will practice courage and try to name these things in the moment; I hope you will be more thoughtful about how you speak about others.