



*This article presents general guidelines for Georgia nonprofit organizations as of the date written and should not be construed as legal advice. Always consult an attorney to address your particular situation.*

## **USING PERFORMANCE REVIEWS TO ENGAGE AND EMPOWER EMPLOYEES**

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No matter the type of business, public or private, employers should have performance reviews for their employees. Performance reviews serve the following purpose: 1) to enforce expectations articulated in the job description, 2) to communicate if expectations are met, 3) to facilitate timely discussion of specific areas and methods for improvement; and 4) to provide specific facts and evidence to support employment decisions, and to help the organization to defend them, if necessary. While experts debate whether such reviews should be annual, or more frequent, it is undisputed that the best way to avoid poor employee relations is to ensure open and regular communication of employment expectation and performance. Therefore, such an obligation can be viewed as either dreadful and tedious, or engaging and empowering.

To encourage an engaging and empowering experience, below are tips for employers commencing performance reviews for its employees:

1. **Preliminary Information.** Before analyzing an employee's performance, determine the objective for the employee's position, what responsibilities the employee is required to perform, and how an employee's performance should be measured. Review the employee's job description, and the company's performance standards to make the determinations. For example, if preparing to evaluate a receptionist's performance, first determine how the job helps the company meet its objectives (such as by providing a welcoming environment for visitors, or by answering all phone calls and other inquiries in a timely way), what expectations were articulated in the job description (such as greeting visitors in a pleasant manner, answering phones, or assisting with company events), and how the performance will be measured (such as by analyzing the volume of calls addressed, compliments to the employee or complaints about him or her). Please keep in mind that, if you find that expectations have changed since the job description was prepared, you should be sure to include a discussion of how expectations have changed, and what they will be going forward so that expectations are always clearly and accurately communicated to the employee.

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Then determine the performance metric (i.e. fails to meet expectations, meets expectations, or exceeds expectations).

2. **Gather Performance Documentation.** Pull documents that address the employee's performance. These documents include examples of work well done, counselings to the employee for job performance, status reports demonstrating what work has been completed, praise or compliments received by the employee or about the employee, or complaints from other employees or from clients or customers of the organization about the employee.
3. **Compare "Preliminary Information" with "Performance Documentation."** Using the job description and the performance documentation, list the main areas of responsibilities and contrast them with the employee's performance. Provide comments for each responsibility explaining what it is that the employee is doing well to meet it, or what it is that the employee is not doing well to meet the responsibility. Articulate (and support) specific examples of things the employee did and did not do to further contrast an employee's performance with employer expectations. This way, if there is litigation, you will have an actual scenario/situation you can reference instead of speaking in generalities. Do not forget to provide suggested ways for improvement, and to allow the employee an opportunity to improve (such as by providing specific timeframes for action by the employee).
4. **Review.** Before disseminating the performance review to the employee, review it to ensure all information provided (from the responsibility itself to the employer's comments) is accurate, comprehensive, honest, and concise. Avoid providing job responsibilities that are not included in the job description, unless you have also communicated the fact of the change and the reason for it to the employee. Avoid providing one word comments regardless if it is good or bad. Identify what makes the performance good, or what makes the performance bad. Keep in mind that the point of the review is to encourage employee engagement, development and empowerment, not to avoid conflict or difficult conversations.
5. **Communicate with the Employee.** Ensure that a detailed discussion of the performance review occurs with the employee in a timely manner, and that the employee is permitted to provide feedback about the subjects covered in the review. It may be helpful to have supporting documents with you to show to the employee at the time of the meeting. Employees should sign and date the review, acknowledging that they have received it. If an employee refuses to sign, that fact should be documented on the review, along with the date and signature of the person making the note.

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A good performance review not only enables growth for both the employee and the employer, but, if it is provided in writing, is communicated to the employee, and provides accurate and timely feedback to the employee, it also serves as evidence to prevent or defend against employment litigation. Therefore, it is imperative to use performance reviews to document and re-affirm what is expected from each employee, an employee's actual performance, and to evaluate and set expectations for the future.

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