

Preparing for the Year-End Review

Part 1 of 2



The spring months mark the end of the performance year. During the Year-End Review, feedback is given that summarizes an employee’s progress towards achieving successful outcomes in the pre-planned duties, goals, and development needs for the entire year and an overall rating is assigned.

It is impossible to have an effective Year-End Review without the completion of the other phases of the Performance Management Process. Planning, Coaching and Feedback, and at least one Check-in must be present in order to have a complete picture of an employee’s performance.

Best Practices:

The Year-End Review along with the rest of the Performance Management process is discussed in our online courses, MG500e: Introduction to Performance Management and MG510e: Performance Management Fundamentals for Supervisors.

BEFORE THE MEETING:	
Spend time planning	<ul style="list-style-type: none"> Review the saved Performance Review Form from the last Planned Check-in as well as any other documentation you may have. Consider feedback received on employees throughout the year using balanced professional judgment. Send the Performance Management Employee Self-Appraisal Form to your employee and specify when it needs to be returned.
“How was this performed?”	<ul style="list-style-type: none"> Take each item (expectation) one at a time. <ul style="list-style-type: none"> Make supervisor comments in the “How was this performed?” section of the form based on the Employee Self-Appraisal Form as well as the comments made during the Planning, Coaching and Feedback, and Planned Check-in phases. Be consistent in your approach and work to avoid bias.
Choose a rating	<ul style="list-style-type: none"> Choose a rating for each expectation. It is important that rating scores for performance be assigned accurately and fairly for each employee to ensure a clear understanding of performance by the employee and supervisor.
Consider behaviors	<ul style="list-style-type: none"> Review any behaviors identified in the Planning phase and Check-in’s as well as any noted throughout the year. Search, again, through the Observed Behaviors resource for sample comments under each behavior. These comments are categorized based on our 1 to 5 rating system.
Overall comments and rating	<ul style="list-style-type: none"> Before clicking the rating box, consider the entire year and not just recent events. Choose an overall rating. Write overall comments, and include any feedback from others. Save the form and send it to the second-level reviewer for review and signature.