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Not Just a Copy/Paste

Writing Impactful Performance Reviews

The email drops, alerting me that my boss has uploaded my performance review. I anxiously wait for the system to load, and my heart plummets as I see familiar phrases appear on the screen. My boss has copied and pasted sentences from my self-assessment as their review of my performance. Their review is four sentences long and leaves me feeling uncertain about how this supervisor has evaluated my work.

Even if you have not had this exact experience, chances are that since most supervisors are not taught how to write performance reviews, you have experienced some disappointment or confusion when reading a review of your performance at some point during your career. This article aims to give voice to this leadership skill gap in academic librarianship and to offer guidance on how to think about and then write and conduct a meaningful performance review in four key parts:

Gathering data

Assessing key considerations

Writing the first draft

Preparing for the performance review conversation

Though performance evaluation systems likely differ between institutions, and these examples are based on my own experience, the concepts can apply to any performance evaluation process.

Gathering Data

I rely on two main sources of data when drafting performance reviews for direct reports. Rather than stare at a blank page on my computer screen as I struggle to remember their myriad accomplishments, I keep a list that I add to throughout the year with examples of notable projects and impacts that I want to highlight. The second data source is the document outlining the employee's goals for the year and any contributions they have made to department, division, or library-wide goals. I refer back to those documents and choose a handful of goals to comment on in my review.

I gather this data and write an outline for each performance review during the time of year when my own work pace is a bit slower. Many academic libraries do performance reviews in late spring or early summer to coincide with the end of a fiscal year. I have also worked at institutions where these reviews aligned with the calendar year instead. I find that, as an

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administrator, I have more available time between the end of November and mid-January than during other times of the year. Similarly, I have more time beginning in May through much of the summer for this work. I encourage each manager to think about where their pockets of available time may be and to allocate some of that time to drafting the reviews. Even if the formal review period is in the spring or early summer, it can be helpful to document the first half of the year in December, if that is when the manager has available time.

Keeping a running list of topics to include as well as starting to write weeks or even months before the deadline helps me to avoid the "recency effect," which results in devoting more space in the review to recent work examples than considering the employee's impact and accomplishments over the full year.[1]

Assessing Key Considerations

Depending on the number of direct reports a supervisor has, they may consider drafting the review of an employee who is a strong performer first. This strategy helps me as I find that writing a performance review is different from other kinds of writing I do. I am cognizant that each word I write will be heavily interpreted by the employee, and I take great care in choosing specific words. I gain confidence when writing performance reviews by starting with that strong performer, and then I am better prepared to write reviews that may include more constructive criticism or draw attention to a performance gap.

As I begin to write, I consider what feedback would be helpful to this employee, what aspects of their work will be important to have documented in my voice, and how best to convey such insights. As a supervisor it is my responsibility to be able to speak to areas of work or specific projects that showcase the employee's skills and have a positive impact on our faculty, students, and broader community. It is also my responsibility to point to areas where the employee could improve upon their current skills or performance in the future. The old adage that nothing in the review should be a surprise is certainly true—both for the exemplary and unsatisfactory—however, reading words of praise or criticism can be challenging for many employees, depending on how feedback has been given to them in the past. When writing reviews, managers must also be cognizant that these documents become part of the employee's official personnel record and serve as important sources of information when new leadership comes in or when there is a reporting change or change of job duties.

The employee's career trajectory and position in the organization are two additional factors managers should consider when writing performance reviews. If an employee has shared a desire to assume a management position in the future and in the past year that employee has led a project, the manager should comment on such performance with this career goal in mind. If the employee is in a tenure track position, the manager should be sure that their review and the employee's accomplishments can be easily understood by those reading the evaluation, as practitioners conducting third year or tenure review may work outside of the employee's area of expertise.

Finally, for any shared work, I like to consider how to best evaluate each individual employee's participation. For example, at my previous institution two employees co-led the exploration of a digital exhibition tool and co-wrote a report with recommendations that we then implemented. In a case like this, I try to use similar language in each review to make sure I am consistently documenting their work. On the other hand, if I become aware that a group member has not honored their commitment to a shared project, I may explain the goals of the project the same way in multiple reviews, but I then comment on the specific deficits in that one employee's review.

Writing the First Draft

When writing a performance review, the first draft generally should not be the final draft sent to the employee. Writing this first draft can take up to an hour, provided I have my list of accomplishments and other documentation in hand. For reasons of equity and the reality that people talk and may compare reviews, when possible, I write about the same amount of text for each review. In a given year, my evaluations are each about 500 words. There is no right or wrong number of words (unless your library has guidelines for managers). That length gives me enough time to share key highlights from the previous year as well as space to offer a few concluding thoughts meant to guide the employee's work in the coming year. Looking ahead to the future might mean referencing a significant upcoming project, like a catalog migration, that the employee has a key role in implementing; or perhaps the employee is going up for promotion, or assuming supervisory duties for the first time. The review is a great place to document your support and encouragement as these changes come about.

After finishing the first draft, I set it aside for a few days, which gives me time to think about any other details I would like to include in the review. I also use this time to read the employee's self-assessment and make a list of anything I have not included that maybe I should, given the employee's emphasis in the self-assessment. I prefer to draft my review before reading the self-assessment to give myself the opportunity to consider the employee's performance based on the evidence that I have gathered. By then reading what the employee has chosen to reflect on, I have a good indication of what they think about their own performance and their achievements. The self-assessment also alerts me to potential areas of growth or pain points that I may need to prioritize discussing in the performance review conversation. Once I have finished incorporating any other details, I print the review and proofread it. I do this two or three times as I am prone to typos.

As I proofread each draft, I consider how the words I use align with the institution's rating scale. It would be a disservice to the employee to document a number of performance issues in the review and then give that same employee a 5/5 rating, reflecting exemplary performance. It has been my practice to send a draft of any performance review that is a departure from previous reviews to HR staff for their perspective before finalizing the review or the rating. HR staff can help managers point out places in the review that may be misaligned with the intended rating. This feedback is especially important when a manager is new or when there has been a reporting change and the manager is writing a review for a particular employee for the first time. Consulting with HR staff also gives the manager the opportunity to alert that office to potential issues, depending on how the employee reacts to the review and rating.

Preparing for the Performance Review Conversation

The timing of the performance review conversation may differ from institution to institution. Ideally, this conversation occurs soon after the employee receives the review. I never want an employee to be surprised like I was when receiving their review, and so at the beginning of each review cycle, I share a timeline with my staff outlining key dates and deadlines. This outline helps them to know when they can expect to hear from me and when our review conversation is likely to be scheduled. It has been my practice to send an employee their review 24 hours in advance of the meeting (or on Friday morning if the meeting is scheduled for Monday). I find that this window of time gives the employee enough time to read and perhaps reread the review but not too much time to worry. I send an email to each employee either attaching the review or linking to the evaluation system where I have uploaded the review.

In my email I thank each employee for their work over the past year and I identify something specific that they have achieved. I verify the time and mode (in person or virtual) of the review meeting and specify that I want to start by hearing from them about any factual errors I made in the review, followed by any questions they have about the content. I have found that asking for my errors first can make the rest of the meeting go more smoothly because it demonstrates that no one is perfect. I have found that these meetings can be relatively brief, less than 30 minutes. However, I always make these conversations a session distinct from our recurring one-on-one meeting. That structure helps to provide a clear beginning and end to the conversation and helps to avoid letting that discussion impact any other business that the employee or I need to discuss.

I start these meetings by thanking the employee for their work and highlighting one or two significant contributions they have made. After addressing any factual errors, I then invite the employee to ask questions about the content, which provides an opportunity to make sure I have been clear in my feedback and to reiterate constructive feedback that I want the employee to focus on in the coming year. The rest of the meeting is spent discussing the next year. I articulate my expectations about their role, work, and goals as appropriate.

Conclusion

Though often thought of as an annual bother, writing performance reviews is a critical part of management and a skill worth developing. Considering how to gather data and what to include, spending time drafting the review, and planning how to share that review and discuss it with the employee can make an often-fraught time for both employees and managers a more meaningful experience.

Notes

1. "Why Do We Better Remember Items at the End of a List? The Recency Effect Explained," Decision Lab, https://thedecisionlab.com/biases/recency-effect.