FAIRNESS OF PERFORMANCE EVALUATIONS

Improvement Recommendations

1. Ensure that all job descriptions are up to date and in alignment with a valid, credible performance evaluation tool.

2. Educate staff regarding how they are being evaluated and what the different performance categories and ratings address within the performance review tool.

3. Complete evaluations on time. An effective strategy to stay on top of getting the evaluations done timely is to announce upcoming employee anniversaries at every management meeting with a gentle reminder that their evaluation is due.
   - The goal should be to complete employee appraisals before or on their date of hire.
   - Most employees remember their date of hire (anniversary date) and expecting their evaluation.
   - The importance of the evaluation is diminished when they are late.

4. Consider implementing quarterly mini evaluations to provide more timely, constructive, and positive feedback to employees.
   - Staff supervising others have a responsibility to coach their employees on a regular basis and do not let things escalate to a point of discipline or termination.
   - No employee should have to wait for their anniversary to learn that their work falls short.
   - In the book First Break All the Rules by Buckingham and Coffman, a Gallop study has shown that employees need feedback every seven days - if we do this, there are no surprises!

5. Allow every employee the opportunity to complete a self-evaluation before the performance review meeting. Compare their evaluation with your own and discuss it with the employee.

6. In order to increase the perception of “fairness”, do your homework.
   - Organize quantitative data, qualitative thoughts and documents to support both.
   - For licensed nurses, collect copies of audits, make a copy of a few of their weekly summaries or change of condition notes, and notes of praise from co-workers, physicians and family members.
   - Review nursing assistant documentation for accuracy, consistency and completeness. Consider their observations and things reported to the charge nurse. Recognize praise received from residents/families/staff/visitors.
   - Identify appropriate qualitative and quantitative information for each job category.

7. Make an effort to collect more information and make sure you let the employee know of your diligent effort. Obtain other supervisory staff members’ opinions regarding line staff. For example, if a CNA has reported to a few charge nurses over the course of the review period, ask each of them to provide feedback.

8. Choose the right time and location to ensure that the employee is in the right mind-set before you begin the performance review.
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9. The reviewer’s approach going into the review should be to coach, build the employee’s self esteem, and move the employee closer to their potential.

- Therefore, conduct the review as an exchange of information, not as a report card.
- The evaluation form is only a tool—a means to an end (honest discussion.)
- The goal should be no negative surprises for the employee receiving the review.

10. Some subjects the review should cover include job proficiency, working relationships with other employees and supervisors, relationships with the residents and their families, and how they fit with the culture of the facility.

11. Performance review model—review the past (20% of discussion), analyze the present (30% of discussion), plan the future (50% of discussion.)

12. When beginning the performance review, be sure to obtain the employee’s comments first.

- Look at their self-evaluation and highlight the areas where your ratings match.
- Ask probing questions and promote self-discovery.
- Ask—“What do you like the most about your job?” and “What frustrates you here?”
- Disagreements should be addressed through discussion and concessions on both parties.
- If not doing the performance evaluation electronically, complete your evaluation form in pencil—and be willing to make adjustments based on the discussion during the review.

13. At the end of the review—ask if the employee being reviewed felt the review was “fair.” If the answer is “no” spending some time to work out the differences in opinion and come to a resolution is warranted.

14. Wait a few days and invite the employee back to see how they feel about the review after a period of time as gone by.

15. Use survey data to better understand the employee experience:

- New Hire Survey- gather the first impressions in the first 30 days of employment and feedback on orientation and training. This allows you to quickly address any issues.
- Employee Commitment Survey- to understand the level of employee engagement.
- Employee Exit Survey- to learn why employees leave.
- Drill down Surveys - to gather insight into why employees scored items on the employee survey the way that they did. These surveys can be used in focus groups as discussion points or to distribute for individual feedback.