

# Performance Review Process

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Prepared for Charitable Advisors HR Nonprofit Peer Group

A group of approximately 12 business professionals in business attire are silhouetted against a bright city skyline at dusk or dawn. They are engaged in various professional activities: some are shaking hands, others are holding laptops or documents, and one is on a phone call. The skyline in the background features several prominent skyscrapers, including the Empire State Building.

FIRST PERSON

# 4 OUT OF 5

U.S. workers are dissatisfied with their performance reviews and would like to see them better reflect their work.

- Reuters study



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# Performance Reviews: The Beginning




# MYTHS & MISTAKES



**I treat all employees the same when it comes to praise and constructive criticism**



**The performance review must discuss salary, performance, and goals together**



**Ratings must be part of the  
performance process**



**I use the “Sandwich Approach”  
to providing feedback**





# How Do We Serve Our Employees?



**As Employees Are  
Treated, So Will They  
Treat Your Customers**



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# The Modern Approach to Performance Reviews



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# Employees Should Initiate the Conversation



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# Encourage an Open and Honest Conversation



# Guidelines for Delivering Recognition and Feedback

Timely

Specific to an individual versus a group or team

Personal for the employee

Come from the heart

Build confidence

# Consider Your Feedback Method

Step 1. Ask

Step 2. Share the behavior

Step 3. Wait for a response

Step 4. Point to the impact

Step 5. Ask for ideas

Step 6. Agree on next steps

Step 7. Follow up

# Impact of Recognition and Feedback

Feedback Focus	Engaged	Not Engaged	Actively Disengaged
<b>Strengths:</b> "My supervisor focuses on my strengths or positive characteristics"	61%	38%	1%
<b>Weaknesses:</b> "My supervisor focuses on my weaknesses or negative characteristics."	45%	33%	22%
<b>None:</b> Ignored	2%	57%	41%

A scenic landscape photograph of a winding asphalt road through a mountain valley. The road curves from the bottom center towards the left, disappearing into the distance. The valley is covered in green grass and shrubs, with steep, forested mountains rising on either side. The sky is a clear, pale blue. Overlaid on the upper left portion of the image is the text "Focus on the Journey, Not Only the Destination" in a large, white, sans-serif font. A thin, light blue horizontal line is positioned above the text.

**Focus on the Journey,  
Not Only the Destination**



# Everyday Strategies

Provide frequent feedback to employees.

Reward employees for more than big things. Little things done well are just as important.

Provide a resource when assigning tasks to an employee.

Periodically ask questions to check-in with employees.

# 1:1 Meetings

What do my follow-up notes say I need to check on?

What do I need to be sure to communicate? What behaviors of the team member am I focused on?

What positive feedback can I give?

What corrective feedback can I give?

Is there something I can delegate?

# 1:1 Meeting Agenda

- FIRST**  
10 MIN Employees discuss issues and items they are interested in.
- NEXT**  
10 MIN Manager will ask for updates on projects or other questions that might be on the front of their mind without making it about them.
- FINAL**  
10 MIN Focus on the future together. This can be to provide feedback.

# Quarterly Check-In

Discuss progress on goals

Encourage employees to ask for help if they are stuck on a particular task

Allow employee to adjust goals or provide more resources for them if necessary

Recognize accomplishments and positively reinforce actions

# Quarterly Check-In Agenda

Begin by focusing on the previous quarter

Break down goals into smaller steps if necessary to allow for milestones throughout the quarter

End the conversation by asking how you can help and what feedback the employee has for the manager

# Compensation Review

Focus on key messages regarding rewards, culture, and employment experience

Confirm any pay changes make sense from “internal equity” perspectives

Point back to financial performance and position of the organization

Focus on total rewards for employees

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# Create Meaningful Goals



# Ways to set and achieve goals

**Specific** - Set clear and well-defined goals.

**Measurable** - You must be able to measure progress.

**Attainable** - Goals must be something the employee can achieve.

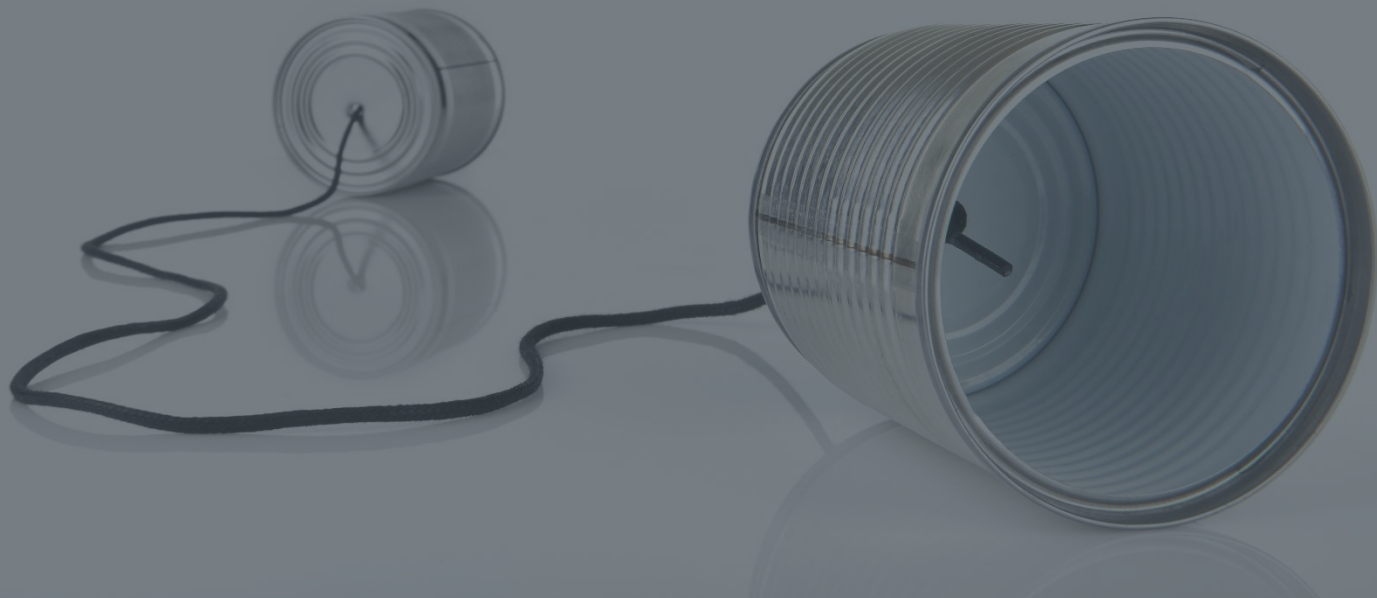
**Relevant** - Ensure all goals are consistent with each other.

**Time Focused** - Good goals must have a deadline.



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# Listen to Learn



# Questions to ask

What do I need to do?

How am I getting there?

Where am I going?

When should this be done?

# What We've Learned...

- 1 Performance reviews will never be a favorite activity – but talking about growth and development can be!
- 2 Make a habit to have frequent interactions
- 3 Separate the performance review from accomplishing comp, development, etc.
- 4 Focus on the employee to allow them to own their development

**Q & A**

# About Mike Bensi and FirstPerson



## Mike Bensi

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FirstPerson is a strategic business advisory that helps organizations of all sizes become better businesses by developing smarter people strategies

**Core Solutions:** Benefits & Compensation, Leadership & Infrastructure, Community & Culture