



## Preparing for and Conducting the Performance Review – Resource for Managers

### Recommended Steps

- Manager and employee review [job description](#) and update as needed
- Employee submits written [Self-Assessment](#) to manager
- Manager solicits multi-rater feedback from colleagues, customers, and direct reports
- Manager documents performance in written [Annual Performance Review](#)
- Annual and midyear conversations are held to align and adjust expectations and goals
- Annual performance reviews are linked to MIT's [Annual Salary Review \(ASR\)](#)
- Manager and employee regularly discuss progress towards performance and development goals

### Beginning the Process

- Review documents and conversations
  - Last's year's performance review
  - Mid-year check-ins
  - Job description
  - Employee Self-Assessment
  - Notes accumulated during the year
- Identify the following:
  - Accomplishments
  - Progress on goals
  - Areas of exceptional performance
  - Areas of growth
  - Additional responsibilities taken on
  - Contributions to special projects
  - Challenges encountered
  - Areas where development is needed or desired
  - Input from multiple feedback providers
  - Key messages to convey

### Writing the Performance Review

- Use clear, concise language to describe:
  - Employee's performance compared to agreed-upon expectations
  - Key accomplishments and contributions
  - Examples of strengths and development opportunities
  - Key expectations for the coming year
- Focus on observable and measurable performance
- Cite specific examples to support your points
- Provide actionable feedback
- Avoid vague statements and exaggerations
- Celebrate successes, position shortfalls as an opportunity for learning and adjustment
- Include goals, drawing from employee's Self-Assessment and your own perspective (may need to revise after the review meeting)
- Use bullet points, if desired



## Preparing for the Performance Review Conversation

- Set aside sufficient, uninterrupted time
- Ensure privacy
- Provide the employee with advance notice of the date, time, location, purpose and format for the meeting
- Let the employee know the preparation you expect of him/her
- Review accomplishments, strengths, obstacles and areas for development
- Consider progress on goals and how you can assist the employee in achieving goals moving forward
- Be clear on your key messages
- Be ready with examples to share

## Having the Performance Review Conversation

- Share the goal and format of the meeting
- Review performance expectations
- Share your key messages for the review, include strengths and areas for development
- Review and comment on the employee's self-evaluation
- Celebrate successes, position shortfalls as an opportunity for learning and adjustment
- Discuss challenges and ways to mitigate them moving forward
- Discuss the employee's goals and revise as appropriate before finalizing the review
- Connect the employee's performance to the needs and goals of the team and organization
- Ask for feedback on your performance as a manager: "What was useful to you over the past year?" "What else could I do to support you?"
- Summarize next steps from the meeting and ask the employee to sign the review

## After the Performance Review Conversation

- Record notes from the meeting
- Submit the review by the deadline
- Reflect on how effectively you ran the meeting and what you could do differently for future meetings
- Plan for follow-up discussions on any open issues and to check in on goals
- Engage in ongoing performance and development conversations

## Be Mindful of Bias in Evaluating Performance

- **The Halo Effect** — Ignoring one area of performance because you are so impressed with another
- **The Horns Effect** — Letting a single negative component of performance affect your entire evaluation
- **The Similarity/Dissimilarity Effect** — Evaluating an employee's performance higher because you have things in common, or lower because they are different from you
- **The Leniency/Strictness Effect** — Evaluating all employees generously or too strict (believing employees may be demotivated by overly negative or positive feedback)
- **The Central Tendency Effect** — Believing so strongly in the team that differentiated ratings might undermine team spirit
- **The Recency Effect** — Evaluating employees only on their most recent performance
- **Contrast Effect** — Overestimating or underestimating performance based on comparisons to other employees