

# HR LESSON 4

## PERFORMANCE APPRAISAL

In this lesson you will learn about the aims and methods of performance appraisal.

You will also learn how to express and justify your opinion.



1. **REVISION** from the lesson 3
2. **PART 1: LEAD – IN ACITIVITY - SPEAKING** exercises
3. **PART 2: READING & VOCABULARY** exercises
4. **PART 3: PERFORMANCE APPRAISAL FORM**

Version without a key.



## REVISION FROM THE LAST LESSON:

- Explain the following words in English and Polish:

weigh up

pros and cons

to hamper

feedback

overall



**THINK:** Name the methods of training?

## LESSON 4

# PERFORMANCE APPRAISAL



**LEAD – IN ACTIVITY - speaking**

- Read the statements below:

- ✓ Performance Appraisal is an important, if not essential, managerial responsibility.
- ✓ Formal performance appraisal systems only create more problems than they solve.

- Now using the expressions below, say which statement do you agree with and why.

➔ To express your personal views use:

- Personally speaking, ...
- I have to say ...
- To tell you the truth ...
- To be perfectly honest, ...
- Personally, I think ...
- I look at it like this: ...
- My attitude is ...

➔ To justify your opinion use:

- I think so because ...
- I think this is because ...
- Because of ...
- The main advantage / disadvantage is ...
- The reason I believe that is...
- The facts suggest...
- The evidence shows...
- The first reason I believe this is...
- The main reason I feel this way is...
- There are several reasons I believe this. The first is...
- There is a lot of evidence to support my point of view. For example...
- There are many facts in favor of my opinion. One such fact is...

## EXERCISE 1 – READING

### Performance appraisal / from Wikipedia

1.

A **performance appraisal**, employee appraisal, performance review, or (career) development discussion is a method by which the job performance of an employee is evaluated (generally **in terms of** quality, quantity, cost, and time) typically by the corresponding manager or supervisor. A performance appraisal is a part of guiding and managing career development. It is the process of **obtaining** analyzing and recording information about relative worth of an employee to the organization.

2.

Generally, the goals of a performance appraisal are to:

- Give an employee feedback on performance
- Identify employee training needs
- Document criteria used to **allocate** organizational **rewards**
- Form a basis for personnel decisions: salary increases, promotions, disciplinary actions, bonuses, etc.
- Provide the opportunity for organizational diagnosis and development
- **Facilitate** communication between employee and administration
- **Validate** selection techniques and human resource policies to meet federal Equal Employment Opportunity requirements

3.

A **common approach** to assessing performance is to use a numerical or scalar rating system **whereby** managers are asked to score an individual against a number of objectives/attributes. In some companies, employees receive assessments from their manager, **peers**, subordinates, and customers, while also performing a self assessment. This is known as 360-degree appraisal and forms good communication **patterns**.

The most popular methods used in the performance appraisal process include the following:

- Management by objectives
- 360-degree appraisal

- Behavioral observation scale
- Behaviorally anchored rating scales

**Trait**-based systems, which rely on **factors** such as integrity and conscientiousness, are also commonly used by businesses. The scientific literature on the subject provides evidence that assessing employees on factors such as these should be avoided. The reasons for this are two-fold:

1. Because trait-based systems are by definition based on personality traits, they make it difficult for a manager to provide feedback that can cause positive change in employee performance.
2. Trait-based systems, because they are vague, are more easily influenced by office politics, causing them to be less reliable as a source of information on an employee's true performance.

4.

Performance appraisals are an instrument for social control. They are annual discussions, avoided more often than held, in which one adult identifies for another adult three improvement areas to work on over the next twelve months. You can soften them all you want, call them development discussions, have them on a regular basis, have the **subordinate** identify the improvement areas instead of the boss, and discuss values. None of this changes the basic transaction... If the **intent** of the appraisal is learning, it is not going to happen when the context of the dialogue is evaluation and judgment.

## EXERCISE 2 – READING COMPREHENSION



**Match the headings with paragraphs 1 – 4.**

- Methods of performance appraisal.
- Criticism.
- What is performance appraisal?
- Aims of performance appraisal.

### EXERCISE 3 – VOCABULARY EXERCISE



Match the words in bold in the text to definitions 1 - 6.

<b>peer</b>	is a method by which the job performance of an employee is evaluated
<b>subordinate</b>	particular characteristic that can produce a particular type of behaviour
<b>trait</b>	a person who has a less important position than you in an organization
<b>allocate</b>	a person who is the same age or has the same social position or the same abilities as other people in a group
<b>performance appraisal</b>	to give something to someone as their share of a total amount, for them to use in a particular way
<b>reward</b>	something given in exchange for good behaviour or good work

### EXERCISE 4 – PERFORMANCE APPRAISAL FORM



Sample Performance Review Form

<b>Employee Name:</b>	
<b>Job Function:</b>	
<b>Date of Review:</b>	
<b>Reviewer Name:</b>	



Name each grid using the headings from the box below:

Job knowledge	Communication	Attitude & Service	Quantity of work
Motivation	Flexibility	Teamwork	Judgment
Overall Rating	Reliability	Learning Ability	

**Example:**

0 →

**QUALITY OF WORK**

<b>Work is performed accurately and neatly. Work is consistent, thorough and complete.</b>	<b>Comments</b>
<ul style="list-style-type: none"> <li><input type="checkbox"/> Outstanding</li> <li><input type="checkbox"/> Exceeds Expectations</li> <li><input type="checkbox"/> Meets Expectations</li> <li><input type="checkbox"/> Improvement Needed</li> <li><input type="checkbox"/> Unacceptable</li> <li><input type="checkbox"/> Not Applicable</li> </ul>	

1 →

Amount of work performed on a daily basis is <b>appropriate</b> for job function.	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

2 →

Understands the <b>job requirements</b> and has specific content knowledge where appropriate.	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

3 →

Is able to <b>adjust</b> to new methods and procedures, and learn new tasks and duties	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	



4 →

Is motivated to complete duties and tasks. Does not require much direction to start or finish work.	Comments
<ul style="list-style-type: none"><li><input type="checkbox"/> Outstanding</li><li><input type="checkbox"/> Exceeds Expectations</li><li><input type="checkbox"/> Meets Expectations</li><li><input type="checkbox"/> Improvement Needed</li><li><input type="checkbox"/> Unacceptable</li><li><input type="checkbox"/> Not Applicable</li></ul>	

5 →

Can be counted on to be at work daily, and be on time. Deadlines are consistently met.	Comments
<ul style="list-style-type: none"><li><input type="checkbox"/> Outstanding</li><li><input type="checkbox"/> Exceeds Expectations</li><li><input type="checkbox"/> Meets Expectations</li><li><input type="checkbox"/> Improvement Needed</li><li><input type="checkbox"/> Unacceptable</li><li><input type="checkbox"/> Not Applicable</li></ul>	

6 →

Adapts well to changes in work schedules. Is open to new ways of doing things.	Comments
<ul style="list-style-type: none"><li><input type="checkbox"/> Outstanding</li><li><input type="checkbox"/> Exceeds Expectations</li><li><input type="checkbox"/> Meets Expectations</li><li><input type="checkbox"/> Improvement Needed</li><li><input type="checkbox"/> Unacceptable</li><li><input type="checkbox"/> Not Applicable</li></ul>	

7 →

Communicates well with others. Have good verbal and written skills.	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

8 →

<b>Handle</b> uncomfortable situations with tact. Recognizes when problems need to be solved.	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

9 →

Is a positive contributor to teams. <b>Gets along with</b> others and acts as a leader.	Comments
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

10 →

<b>Projects a positive attitude in the workplace. Services the needs of others (internal &amp; external).</b>	<b>Comments</b>
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

11 →

<b>Overall Performance</b>	<b>Comments</b>
<ul style="list-style-type: none"><li>■ Outstanding</li><li>■ Exceeds Expectations</li><li>■ Meets Expectations</li><li>■ Improvement Needed</li><li>■ Unacceptable</li><li>■ Not Applicable</li></ul>	

**Specific Areas for Improvement by Next Review Period:**

**Signatures:**

<b>Supervisor Signature:</b>		<b>date:</b>	
<b>Employee Signature:</b>		<b>date:</b>	

**Employee Comments (Optional):**