Performance Excellence Ratings in 2021

The Covid-19 pandemic has impacted every aspect of our lives – home, work and family. As a manager, you may have needed to adapt to managing your team and goals remotely, while team members likely had varying levels of complexity relative to home and family responsibilities.

How might we approach evaluating performance in this unique year?

Guidelines

Following the guidelines below may help you rate objectively and equitably, across a wide variety of personal circumstances.

✓ **Do not surprise your team member in the review or rating.** Did you set explicit expectations with each staff member about their performance this year? Expectations about what will be done and also how and when? Have these expectations been kept current?

  If so, great! If not, be cautious about evaluating performance relative to implicit expectations. Expectation-setting conversations this year may have included topics such as:

  - Quality and timing of deliverables
  - Flexible or COVID-19 Alternative working arrangements
  - Online meeting protocols
  - Use of email and MS Teams for communications, including response times

✓ **Be neutral about caregiving responsibilities, illness, and/or leaves.** When evaluating performance, do not explicitly or implicitly refer to caregiving responsibilities, periods of illness, and/or related leaves (either in negative or positive terms). The emphasis in Performance Excellence should anchor on whether or not someone met the performance expectations around work, goals and priorities that were set. Similarly, accommodations granted by the Office of Equity must be kept out of Performance Excellence considerations entirely. Evaluate performance, and performance alone.

✓ **Scan for Consistency.** Look across your staff member reviews and scan for consistency in your assessment and feedback. Are you treating similar situations similarly? If not, seek to understand why and correct the inconsistency, as needed.

✓ **Keep it REAL:** Leverage Northwestern’s REAL conversation framework as you prepare performance reviews and conversations. Performance conversations are a valuable tool for building trust, engagement, motivation, and learning. REAL conversations should be separate from discussions about merit. Plan your REAL conversation today.

Do you have a question or situation to talk through? Contact your HR Business Partner hrbp@northwestern.edu

For additional Performance Excellence resources, visit http://perform.northwestern.edu

For more thoughts about rating during a pandemic, see these articles:

- Harvard Business Review: How do you Evaluate Performance During a Pandemic?
- McKinsey: Individual performance management in the covid-19 world