

TIPS FOR EFFECTIVE PERFORMANCE DOCUMENTATION

State Facts, Not Conclusions

Example I:

“Shelly retaliated against Kathy after Kathy complained to their supervisor that Shelly was not getting her work done on time.”

Reworded with Facts

“On Friday, Kathy told Tom that Shelly did not complete the weekly progress report. On Monday, Shelly rescheduled the start time for team meeting from

4:00 pm to 2:00 pm and did not inform Kathy, who missed the meeting.”

Example II:

“When I asked Casey about the incident, I could tell he was lying.”

Reworded with Facts

“When I asked Casey about the incident, he stopped making eye contact with me, he began fidgeting with papers on his lap, and his explanation included several ‘wells, ‘ums’, ‘ahs’.

Use specific examples to support general observations

Observation: “He does not respect other staff and is not a team player.”

Specific Example: “On Tuesday, April 5, during the staff meeting, Troy interrupted John’s presentation by saying, in a loud and stern voice “This is NOT what we decided a week ago at our retreat!” Before the retreat I asked all staff to bring at least one concrete suggestion for the group to discuss. Troy did not make any suggestions or participate in the discussion.”

Minimize use of descriptive adjectives such as always, never, very, often and seldom

These terms lack precision and are open to different interpretations, such as:

“Henry never keeps me informed so I always get blindsided by our VP”

Review your documentation with Human Resources

ABC’s of Documentation

Accurate:

- Document as incidents occur rather than from memory
- Describe those actions you directly observed or heard; NOT hearsay
- Concentrate on job-related incidents

Behavioral

- Document specific behaviors about job-related facts rather than describing employees’ personality

Consistent

- Balance the documentation; cite both positives and negatives
- Use the same format and level of detail for each employee