Appreciative Performance Review

A Case Study

► **Process Improved:** Annual Performance Evaluation exercise with Academic Staff Employees

► **Unit (s):** Started with Wisconsin Union Mini Courses, now Union-wide.

► **Customers of the Process and Their Needs:** Academic Staff at the Wisconsin Union. Needed a Performance Evaluation process that was respectful and generative.

► **Problem/Opportunity Statement:** The Appreciative Inquiry process provided a methodology for making annual performance evaluations an opportunity for learning and growth for both the employee and the supervisor. Organizations are only as good as the people and the relationships that they are made up of. An appreciative approach to performance evaluation determines what is working well and co-creates a visionary future for the individual employee.

► **Changes Made:** Evaluation process changed from an arbitrary evaluation of supervisor determined criteria to a dialogue around what is working well for the employee and how both they and the supervisor can build on those strengths. Process begins with sharing stories from the previous year, both employee and supervisor, then through a series of questions that ultimately leads to a supervisor generated narrative reflecting the scope of the dialogue and plans for the upcoming year.

► **Results:** Both employees and supervisors can look forward to this annual process and have been more likely to revisit plans made during the year. Unit mission/purpose is advanced as the employees grow in those areas that are identified strengths and known to already be working well. Co-created future vision for the employee within that mission increases commitment and retention.

► **Lessons Learned:** Understand that dialogue takes time and can be “messy”. Trust that what is working well (something always is, no matter how dire the situation) is so inextricably tied to the issues or problems that might exist that the dialogue will get to these issue, but from a positive, pro-active and generative perspective.

► **Next Steps:** Apply to Classified and Student staff performance evaluations.

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WI Union Academic Staff
Annual Performance Evaluations
...a four-step process

- Review Position Description and Annual Goals
- Prepare for Dialogue Session
- One-to-One Dialogue
- Final Written Narrative
Program Staff Annual Performance Evaluation

Dialogue Questions

The following questions are offered as a guide and recommended tool to facilitate an annual evaluation of employee performance. Both employee and supervisor should (independently) give these questions thought and prepare answers prior to a one-on-one dialogue. This sheet and the answers you develop are not to be turned in. The supervisor will compile a final narrative based on your dialogue. You will have opportunity to review and add comments to the final narrative before it is submitted to your personnel file.

REVIEW

1. Prior to reflecting on these questions, your Position Description and annual goals should be reviewed. Any suggested revisions should be shared with your Supervisor.

2. Thinking about the last year, describe a time(s) when you felt the most excited, engaged and involved in your work here at the Union.

ANALYZE

3. What were the key elements that made the above a peak time(s) or experience(s)?

4. What things do you wish had worked better in the last year?

5. What have you learned from these experiences?

6. (Optional) Again, thinking about the last year, what stands out for you in the working relationship you had with your Supervisor?

PLAN

7. What ideas do you have for making the key elements identified above (Question 3) more a part of your everyday work experience at the Union?

8. What first steps do we need to take to make these ideas/dreams a reality?

   What steps do we need to take to help with those things you wish had worked better?

9. What things can your Supervisor do to help with these steps?

10. What additional comments or observations would you like to make about this past year?