

ANNEX 9B: PERFORMANCE REVIEW GUIDELINES

Performance Review Guideline

Purpose

It is important to keep in mind the main objective of the performance review session which is volunteer development. The goal is to assist the volunteer to do a better job by developing the volunteer's skill and knowledge to meet the needs of their work.

It is NOT a time to criticise them, confront on certain incidents nor is it a time to put them down.

Use

Effective supervision or performance review session can facilitate volunteer development as:

- It allows you to inform your volunteers on how well they are performing
- It is an opportunity for both parties to clarify work assignments, results and standards.
- It is a platform for both parties to identify and remove barriers to productivity i.e. improving work processes
- It gives staff a better understanding of volunteers' potential
- It acts as a record of each volunteer's growth
- It reduces any favouritism in treatment of volunteers
- It facilitates communication and staff – volunteer relations

Basic Principles

A performance review is MORE than just completing and discussing the form with volunteers; it is part of a system. Therefore it is not an end nor is it a beginning; it is part of a continuous cycle. Volunteer supervision should be part of the daily work of the staff. Staff should observe, monitor and provide feedback and direction on volunteer's performance regularly.

DO NOT wait until it is performance review time to try and remember or reconstruct events. Performance review sessions require staff to summarise periodically the work of the volunteer for the last two years. Therefore it is suggested that staff keep a record of significant points to ensure accuracy and fairness.

DO NOT focus only on negative performance. An effective supervisor is observant of positive behaviours and consistently reinforces those behaviours.

Preparing for the session - Self

1. Inform the volunteer at least two weeks in advance where and when the review will be conducted and what it will cover. Send them a copy of the Performance Review form for them to do a self-evaluation. Let them know that they need to complete it and bring it for the session.
2. Review the volunteer's personal history (education, training and experience).
3. Review the job description.
4. Review any records indicating their level of performance. Be objective in your assessment. Do your best to eliminate personal prejudice, bias or favouritism from your reasoning.
5. Consider how the volunteer has met the requirements of the position as established in the job description.
6. Avoid the "halo" effect i.e. DO NOT let one favourable or unfavourable trait or incident influence your judgement of a volunteer as a whole.
7. Be generous in rating the best of volunteer's qualities and be realistic in rating weaknesses.
8. Ask yourself, are the volunteer's capabilities being put to the best use? Is the volunteer ready for different and greater responsibilities?
9. Consider any unusual circumstances such as ill health or any other unforeseen circumstances that may have affected performance.
10. Think about the overall effectiveness of the volunteer and steps that can be taken to improve performance.

Preparing for the session – Environment

- The session should be conducted in a private and comfortable surrounding.
- Minimise interruptions during the session.
- Do not be pressured to end the session quickly.

- Strive to create a friendly and relaxed atmosphere.

Conducting the session

Some tips:

- ❖ Use the volunteer's self-evaluation to facilitate discussion.
- ❖ As you go through the form, let the volunteer do most of the talking.
- ❖ Listen carefully to what the volunteer has to say
- ❖ Paraphrase and summarise in your own words what the volunteer has shared. This allows you to check the accuracy of your understanding.

Do's

- ☑ Assure the volunteer the main focus is individual performance development and the performance review is just a tool.
- ☑ Allow for 2-way conversation
- ☑ Admit your mistakes when you are at fault.
- ☑ Show appreciation of volunteer's good performance.
- ☑ Be frank yet tactful in discussing the volunteer's shortcomings.
- ☑ Focus negative feedback (if any) on the volunteer's work rather than at the person.

Don't's

- ✗ Dwell on past mistakes.
- ✗ Dominate the conversation
- ✗ Talk down to volunteer.
- ✗ Compare them to another person.
- ✗ Imply in any way that the session is for warning or reprimanding the volunteer.
- ✗ Feel obligated to agree on everything.

Ending the session

- Make sure you have made clear of all the points you wanted to cover
- Check that the volunteer have expressed clearly his thoughts on his own development
- Ensure problems have been reviewed
- Make certain you have told the volunteer, in definite terms, how you have appraised his overall performance
- Review the plan of action that was mutually developed

*** Due respect should be given to the volunteer's privacy as the form contains confidential information**

The Performance Review Form – things to take note

- Note that for extreme scores of 1 and 5 for all the questions, remarks are required to justify the scoring.

All forms will be reviewed by the BEVM to further reduce any biasness and prejudice.

- The maximum score is 65 pts i.e 5pts x 13 questions
 - So at the end of the review, total up the score & $(\text{total score} / \text{maximum score}) \times 100$ to get the % of performance level.
- If volunteer does not meet the performance level required (i.e. at least 70% for reappointment for another term and 80% for promotion to BSC) and staff would still like to recommend, reasons must be stated in the comments section.