

**Performance Appraisal Café Overview**

The Performance Appraisal Café is a short blended learning experience oriented around the concepts and skills found in the Harvard ManageMentor Performance Appraisal topic. The Performance Appraisal topic will help managers:

* *Prepare for a performance appraisal meeting with a direct report*
* *Conduct a performance appraisal meeting with a direct report*
* *Monitor an employee’s progress on performance goals*

The learning experience has three components:

*60 to 90 minutes 60 minutes Ongoing*

Part 1: Pre-work (self-paced, individual)

Before the live Café session, participants are expected to complete the following assignments:

* Review the following online lessons from the Harvard ManageMentor Performance Appraisal topic:
  + Why Conduct Performance Appraisals?
  + Prepare for a Performance Appraisal Meeting
  + Conduct a Performance Appraisal Meeting
  + Monitor an Employee’s Progress
* Complete the online assessment from the Harvard ManageMentor Performance Appraisal topic
* Complete the tool “Worksheet for Preparing Performance Appraisal Feedback” in the “Prepare for a Performance Appraisal Meeting” lesson of the Harvard ManageMentor Performance Appraisal topic
* Complete the practice activity “How Well Do You Conduct Appraisals?” in the “Conduct a Performance Appraisal Meeting” lesson of the Harvard ManageMentor Performance Appraisal topic

Part 2: Café session (live, group)

The Café session represents the core element of the learning experience. The session provides an opportunity for managers to:

* Exchange ideas and questions with others
* Discuss the context of how concepts and skills apply in the workplace
* Practice and begin application of those concepts and skills
* Build momentum and support for applying the concepts and skills in the workplace

The Café session focuses specifically on the following concepts and tasks from the Performance Appraisal topic:

* Identify and apply performance appraisal best practices
* Evaluate and discuss performance objectively
* Orient feedback toward action

Facilitating the Café session as outlined should take approximately 60 minutes. If the facilitator prefers a shorter session or wishes to spend more time on a specific concept or activity, he or she may want to cover only those concepts and activities that are most relevant to the group.

| SECTION | ACTIVITY | TIME |
| --- | --- | --- |
| **Introduction** | Show icebreaker question while participants are arriving to the session (WHICH ASPECT OF PERFORMANCE APPRAISAL DO YOU THINK IS THE MOST DIFFICULT?)   * Introduce facilitators. * Review tips for using technology during the session. * Debrief icebreaker question. * Set context: As a manager, one of your most important duties is to evaluate your employees’ performance. However, it’s no secret that many employees and managers dread performance appraisals. The good news is that by approaching the review process as a partnership with your direct reports, you can develop an approach to appraisal and improvement that reduces the anxiety while improving the outcomes for all. We are going to explore perspectives and strategies for doing so on our session today. * Review session objectives. | 10 minutes |
| **Skill focus: Identify and apply performance appraisal best practices** | * Facilitate practice activity. Participants:   + Review the four key steps in the performance appraisal process   + Reflect on best practice approaches to conducting performance appraisals   + Consider what gets in the way of implementing best practices in the “real world” and discuss what they might do to avoid or overcome these obstacles | 10 minutes |
| **Skill focus: Evaluate and discuss performance objectively** | * Facilitate reflection activity: Participants.   + Reflect on ways that a manager’s perception can cloud his or her view of an employee’s performance   + Identify and discuss possible solutions to help a leader control for personal bias in the appraisal process * Facilitate reflection activity: Participants: * Review “Rating Errors” infographic * Consider ways to avoid common rating errors * Facilitate debrief activity. Participants:   + Discuss their inputs to the “Worksheet for Preparing Performance Appraisal Feedback”   + Reflect on the importance of developing a “core message”   + Consider an example of a common issue often tackled in performance appraisals; suggest one-sentence core messages to shape a productive discussion aimed at addressing the issue | 17 minutes |
| **Skill focus: Orient feedback toward action** | * Facilitate practice activity. Participants:   + Reflect on the link between feedback and performance as part of an actionable, ongoing performance management process   + Explore a “goals grid” of the four key questions that managers can use to help employees apply performance appraisal feedback and identify development goals   + Suggest questions a manager might ask to help employees process performance feedback and reflect on next steps * Facilitate practice activity. Participants:   + Review a short "What would you do?" scenario that involves giving challenging feedback to an employee   + Discuss the responses and any differences in participants’ views   *\*Note: Experienced facilitators also may conduct a virtual role-play scenario with one participant playing the role of the manager in the scenario and another playing the role of the employee.* | 18 minutes |
| **Applying what you’ve learned** | * Review session objectives and skill areas discussed. * Review directions for completing the On-the-Job section of the online Harvard ManageMentor topic, including the action plan. * Close the session. | 5 minutes |

Part 3: Application (self-paced, individual)

After the live Café session, participants are expected to complete the following assignments:

* Complete the online On-the-Job section in the Harvard ManageMentor Performance Appraisal topic. The section provides learners with an opportunity to choose a skill to focus on and create an action plan for applying and developing the skill. *Note:* If your organization does not include the On-the-Job section in your configuration of Harvard ManageMentor, ask participants to think of two things they can do over the next 90 days to further apply and develop their skills in this area.
* Execute their action plan over a specified time frame (e.g., 60 or 90 days).
* After the specified time frame (e.g., 60 or 90 days), access the online On-the-Job section in the Harvard ManageMentor Performance Appraisal topic to update the action plan and reflect on the experience.