



Critical Incident File / Weekly Observation Report Documentation Guidelines

At times, performance evaluations may be a difficult, unpleasant responsibility for supervisors. However a properly administered performance evaluation is a valuable tool for increasing employee engagement and motivation. Consider these guidelines when preparing an effective performance evaluation:

- Measure objective, not subjective, performance criteria;
- Consider employee performance throughout the entirety of the established evaluation period;
- Elicit on-going communication with employees regarding actual performance (be it acceptable or unacceptable); and
- Engage employees to thoughtfully consider future performance goals and commitments.

To determine objective performance criteria related to performance standards, ask yourself:

- Are the performance criteria relevant to the job?
- Are the performance criteria unbiased?
- Are the performance criteria significant to the job?
- Are the performance criteria practical?

With these points in mind, the following Documentation Guidelines and Critical Incident File process will help supervisors and managers capture appropriate, objective performance criteria to be used in the performance evaluation process.

- The weekly observation report is intended to be an objective method from which formal performance evaluations will be completed and documented.
- On a weekly basis, supervisors should complete an observation report for each direct report.
- Supervisors may complete the initial weekly observation report at a time/date of their choosing. Once selected, the time/date should remain consistent in the weeks/months that follow.
- Weekly observation reports completed by each supervisor during the preceding month, should be submitted to that supervisor's manager for review no later than the 10th day of the following month.
- Each employee's weekly observation reports should be used in preparation for and in completion of the employee's formal performance evaluation (e.g., annual, bi-annual, quarterly, etc.)
- To eliminate surprises, minimize suspicion and enhance communication between supervisors and employees, all documented performance observations (above average and/or below average) should be discussed with the employee on a weekly basis.

CRITICAL INCIDENT FILE / WEEKLY OBSERVATION REPORT

Employee _____

Position _____ Location _____

Observation Period From _____ To _____

Compiled By _____ Date _____

Above Average Performance Observed

Below Average Performance Observed

_____ discussed _____

_____ discussed _____

_____ discussed _____

_____ discussed _____

_____ discussed _____

_____ discussed _____

_____ discussed _____

_____ discussed _____