



Your Annual Review: Tips to make yours work for you!

You have rights and power in the workplace – even at your review!

What is a Performance Review?

The collective bargaining agreement (contract) between AFSCME 3800/Council 5 and the University of Minnesota Board of Regents states:

The University and the Union share a belief that the purposes of the performance appraisal system include the following: to clarify both management's goals for the position and the employee's goals; to monitor the employee's achievements and any areas of needed improvement; to facilitate communication between supervisors and employees about the employee's job duties and establish a framework for open, constructive feedback; to encourage and develop plans for employee development and growth.

The following was taken from “Preparing Performance Reviews, Tips for Managers” online training presentation from the UMN web site offered through UMN Training Services

A performance review is an annual, formal appraisal of an employee's past year's performance and goal accomplishments. Objectives of performance reviews are:

- Identify employee strengths and areas of improvement.
- Provide an overall performance rating.
- Lay the groundwork for setting future goals and objectives.

Performance concerns or issues that involve discipline should not be addressed as part of the performance review process. Disciplinary issues should be taken care of in separate performance coaching conversations or through corrective action process.

Your performance reviews remain in your personnel file for your entire career at the University. It's incredibly important that they are accurate. This document includes tips for ensuring that your review reflect your actual performance.

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1. **Make sure you have a current job description.** Your job description defines your duties – if it is not accurate, work with your supervisor to update it. Do not allow your supervisor to review you on job duties that were not listed on your job description for the period being reviewed.
2. **Make sure you know what your performance standards and expectations are.** Without clear descriptions of the performance standards and expectations, any review would be purely arbitrary.
3. **Know the timeline being reviewed - it is generally for the previous year.** You should only be reviewed for a period of time during which you had a complete, up-to-date job description and performance expectations. This also means you should be reviewed for the entirety of that time – not just the past month or two.
4. **The review is about patterns - not one incident.** Your reviewer should document patterns of work behavior with specific examples. This requires careful record keeping.
5. **If it turns disciplinary – HALT THE MEETING IMMEDIATELY!** You have the **right** to have an AFSCME steward present during ANY meeting that you can reasonably believe could lead to discipline.
6. **You must be given 3 days' notice of meeting.** You need and have a right to at least 3 days' to prepare for your review. The process should be clearly outlined for you.
7. **Bring in positive examples of your work. Toot your own horn!** This is your time to show the contributions you've made. Even if your supervisor is well-meaning, they cannot be expected to know all of your special accomplishments and skills.
 - Emails of thanks and compliments on your work
 - Examples of work you've done especially well
 - Lists of ways you have gone above and beyond for the success of your area
 - Special talents you have utilized
8. **Take detailed notes in the discussion.** Listen to your supervisor and take detailed notes. You will have time to reflect and comment on what is said after your meeting and your notes with specific statements will be invaluable.
9. **You have the right to write a response to your review. This is a very powerful step!** Be thoughtful, though, and don't just respond during the meeting. Your response to the review is your chance to add your version of what your supervisor has said at your review. You may not agree with what was said. Your verbatim response should be attached to your review and submitted to your permanent HR file where it will become part of your permanent employment record.
10. **At the time of the meeting, discuss job description, duties and performance standards for the next year.** This is an important part of the review process. You should bring a list of all of the duties you have been doing and update your job description so that you and your supervisor have an agreement about what will be expected of you in the next review period.
11. **You have the right to see any changes made by a higher level supervisor to your review.** Any and all changes made to your review should be made available to you and you should be given the opportunity to address any changes. It is OK to ask if anyone else will be involved and remind your supervisor or HR director that you will need to see them.
12. **You have the right to know the specifics about any and all criticisms made against you including who made them.** Do not give away your power and accept anything less. In a court of law, evidence would be inadmissible if not properly documented. It is true here too! Supervisors may want to wield their power and tell you otherwise, but you have a right to know. Call your AFSCME steward if you have any problems or questions about this.
13. **If there are inaccuracies, demand a correction!** This can be done through a problem solving meeting or a grievance. Call your steward, you are not alone!