

How to Conduct a Fair and Inclusive Review Process – Resource for Managers

For each step in the performance development process, including evaluating performance, providing coaching and feedback, and having career development conversations, it is essential for managers to check-in on their own assumptions and biases and how they might affect decisions in the performance review process.

Manage a Fair and Inclusive Review Process

- Set specific criteria and apply criteria consistently
- State the facts (goal completed, or not; circumstances surrounding the work; barriers; resources; etc)
- Focus on concrete performance, observable behavior, skills and accomplishments
- Avoid judging employees more or less favorably due to personal similarities or differences
- Give honest and constructive feedback to everyone
- Ask for and be open to feedback
- Tie feedback to departmental goals and outcomes
- Seek input from multiple feedback providers and explore views that are opposite from your own
- Check-in on assumptions by asking clarifying questions
- Consider individual development needs and interests, learning styles, and motivators
- Try to think about those in stereotyped groups as individuals
- Review all evaluations for consistency (consistent criteria, length, strengths and developmental feedback)

Be Mindful of Common Biases when Evaluating Performance

- ✚ **The Halo Effect** — Ignoring one area of performance because you are so impressed with another
- ✚ **The Horns Effect** — Letting a single negative component of performance affect your entire evaluation
- ✚ **The Similarity/Dissimilarity Effect** — Evaluating an employee's performance higher because you have things in common, or lower because they are different from you
- ✚ **The Leniency/Strictness Effect** — Evaluating all employees generously or too strict (believing employees may be demotivated by negative or positive feedback)
- ✚ **The Central Tendency Effect** — Believing so strongly in the team that differentiated ratings might undermine team spirit
- ✚ **The Recency Effect** — Evaluating employees only on their most recent performance
- ✚ **Contrast Effect** – Overestimating or underestimating performance based on comparisons to other employees

Check-in on Personal Biases and Strategies

- ✚ What kind of biases have I experienced myself? How has that affected me?
- ✚ What part of my own agenda is being served by this decision?
- ✚ Does this employee/situation remind me of someone else? Is that association applicable to this situation?
- ✚ Are there differences in work style or approach between me and the person I am evaluating? Can these differences influence my evaluation of the employee?
- ✚ What do I imagine are this employee's aspirations? Is this what I imagine, or what he or she has told me?
- ✚ What strategies can I put in place to engage fully and consciously, putting my biases aside?