

Tips for managing your performance and preparing for performance discussions

Why Should You Manage Your Performance?

- You know more about your performance than anyone else.
- You know the difficult tasks you completed under tight deadlines and the valuable contributions you made throughout the year.
- When you keep track of your performance, you put yourself in the best position to get the rating you deserve, and if you receive an unfair rating, you will have the information needed to support a grievance.

When?

- Throughout the performance year, collect examples of your good performance that support the rating you want and share them with the rating official.
- At your mid-year discussion.
- Preparing your accomplishment report.

At the Beginning of the Performance Year

- Read the performance dimensions and descriptors for your position/pay band. (Dimensions for [Examiners](#), [Specialists \(Law, Policy, and Analysis\)](#), [Specialists \(Services and Innovative Solutions\)](#) and [Administrative Support Personnel](#)).
- Cut and paste your dimensions into a document where you can keep track of examples of your performance throughout the performance year.
- Be familiar with the descriptors under each dimension and how performance can meet or exceed a dimension.
- Discuss the performance dimensions with your rating official and ask the rating official to provide examples of met or exceeded performance.

At the Mid-Year

- Prepare talking points for your mid-year discussion with specific examples of your performance and how they support a rating of met or exceeded for each dimension.
- Review each performance dimension and its descriptors with the rating official.
- Ask the rating official how they would rate your performance for each dimension (i.e., met or exceeded most descriptors?).
- Summarize your understanding of the mid-year discussion. Consider sharing your summary with your rating official. A written summary can be useful when preparing your accomplishment report.

(continued)

Year End: Prepare an Accomplishment Report

■ READ

- Carefully read each of the performance dimensions and their descriptors of met/exceeded performance.
- Cut and paste your performance dimensions and descriptors into a blank document (if you did not do so earlier in the year).

■ GATHER

- Review your calendar, Outlook meetings, completed documents and job assignments.
- List all assignments, exams, projects, presentations, teams, and committees worked on.
- Gather all comments on your performance (e.g., supervisor emails, formal feedback, AEFs, informal comments and complimentary messages by bankers/peers/supervisors).
- Feedback you received for projects, exams, details and special assignments.

■ DESCRIBE

- How you met or exceeded the descriptors for each dimension providing specific examples of your performance.
- Do not assume your rating official knows all the work you did or will remember that work when it comes time to rate you.
- The challenge or situation you faced, the actions you took, the results of your work and whether it met or exceeded a dimension.
- If you had to work outside your regular tour of duty to finish a complex assignment in the time allotted, state that. If you had to pick up a coworker's responsibilities due to an emergency or change in assignments, mention that. Note if there was a challenging situation (e.g., lack of staff, excessive workloads, lack of training) that impacted the performance of work.
- Make it look professional. Use active verbs (e.g., devise, motivate). Check spelling and grammar.

Rating official responsibilities under Article 8 of the collective bargaining agreement:

- Conduct ongoing performance discussions
- Refer to performance dimensions when providing performance feedback
- Notify the employee if a decline in performance is noticed
- Only evaluate the employee on work assigned or performance
- Provide fair, equitable, and objective performance ratings
- Consider factors outside the employee's control (e.g., workload, change in OCC priorities)
- Share with the employee any performance feedback received or prepared within 15 workdays (employee may rebut feedback)

There should be no surprises when you receive your performance rating!

If you are unhappy with the performance rating you receive, contact an NTEU steward to discuss filing a grievance to enforce the contract language.