

Documenting Performance

1. Purpose for Documenting Performance:

Provides focus on what needs to be accomplished, and how and when.

Improves Performance and Processes This is a useful tool to capture areas of strength and needed improvement, including the next time the activity is repeated or something similar needs to be planned.

Enhances Communication The information can assist with recall for updating employees, co-workers, or supervisors about interactions and activities that are important.

Supports Decision Making More well-informed decisions can be made at all levels of an organization when there is documentation supporting the needs and choices.

Lays the Groundwork for Self-Review/ Annual Review Without this information being maintained on a regular basis it may be difficult or impossible to sit down and prepare to write a review of the past 12 months.

2. What is Important to Document?

Collect information that will help answer:

- What were actual results?
- What were the differences?
- What went well?
- What did they learn?

Activities and progress toward meeting goals and objectives need to be tracked regularly. Note specific examples of what was accomplished, how much, when and how. It may also include challenges and roadblocks.

Expectations, Goals, and Objectives Track those that are successful and those that are unsuccessful or need to be done differently.

Decisions Keep track of important decisions and what influenced them.

Conversations Since coaching can be both formal and informal this provides an on-going record of the desired results and concerns of both parties.

3. How to Document Performance?

General Guidance While choosing the "right" format is not the priority; picking a method you will use with ease can help ensure it is done thoroughly and regularly. This is your supervisory record, it does not go into an employee's personnel file.

Include - Who, What, When, Where, Outcome/ Impact/ Learning

Be honest. Don't sugarcoat or embellish.

Facts only. Avoid opinions, feelings, perceptions, judgements, inferences or hearsay.

Work-related only. Personal information such as beliefs, opinions, feelings, dimensions of diversity have no relevance to performance.

Documentation storage/type:

File Folders

Checklists

Minutes

Journals

Emails

Tasks Lists

Logs

Computer folder

Reports

Copies of completed projects

Thank you notes

Word Documents