

## Conducting Performance Evaluations Remotely

In this time of social distancing, remote work, self-isolation and/or quarantine, we are asking supervisors to conduct performance reviews virtually rather than in face-to-face meetings. For some supervisors, this is new and can feel uncomfortable. In some cases, a supervisor may feel that a conversation around performance is now superfluous and a written evaluation is enough for an employee to know where they stand with respect to their performance. In this time of reduced physical personal interaction, supervisors must make extra effort to connect with their employees to help the employee feel engaged and direct conversations around performance must be conducted, albeit virtually.

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To help facilitate a meaningful conversation for both the supervisor and employee, the following tips are suggested for supervisors to make online reviews the most effective possible.

- Leverage video conferencing to the extent possible. Webex is the most supported and common platform used across campus.
  - Before performance reviews are initiated, download Cisco Webex from the Software Center while logged onto the ISU network by typing Software Center in the Windows search box at the bottom left of your desktop. Find Cisco Webex and download it onto your PC. Setup is straightforward and once done, you will have a “Meeting Room” available to schedule video conference calls. Use the following link for support on Webex:  
<https://iastate.webex.com/mw3300/mywebex/default.do?siteurl=iastate&service=9>.
  - Where possible, adding video so you and your direct report can see each other is advisable and is as close to being in person as possible.
- Schedule the time on both your own and your direct report’s calendars for the review to take place
- Communicate the format of the review and expectations well in advance
- For units using a common review form that includes employee self-evaluation, take the time to review the employee’s evaluation and be prepared to address each point and how you see the employee’s performance on that item
- Be intentional. Avoid rescheduling the meeting unless there is a compelling reason, though COVID-19 activities may necessitate flexibility for employees and supervisors. Let your people know that conducting reviews is important. See the University’s [Outline for Conducting an Effective Performance Review](#) for additional guidance.
- Discuss goals for the next review and schedule check-ins (also by video if possible) to ensure alignment on goals and to check progress toward them. Regular video discussions can go a long way toward replacing the lost in-person contact.

### Additional Guidance

The annual performance review is not the place to mention concerns about an employee's performance for the first time. If there are concerns that haven't been communicated, take some time before the annual review is delivered to discuss those concerns with the employee, also preferably by video in this time.

More guidance on performance management for staff and merit employees can be found on the [Employee Management](#) page on the UHR website. As a reminder, supervisors must confirm completion of the performance review in Workday.

If you have any questions regarding your local process, how to handle performance issues with an employee, how to conduct the review or how to plan the conversation, please contact your local HR Delivery representative or request assistance through [HR\\_Delivery@iastate.edu](mailto:HR_Delivery@iastate.edu).