

## Section V: Talent Conversations

### Performance Review Narrative

The narrative method of documenting and reviewing performance involves “writing a story” to describe the performance of an employee. Narratives need not be limited to descriptions of job behavior or abilities, but can also include plans for training and development and results of problem diagnostics and performance problem solving.

The narrative method is exceedingly flexible. It can be composed of one single general narrative or it can be structured using pre-designated categories. For example, your narrative might include categories like “Institutional Goals,” “Individual Goals,” and “Talent Development,” or use any categories relevant to a particular employee’s work. The narrative can be structured in almost any way, with many categories or very few. You may write in paragraphs or use bullet lists. Choose the format and style that will be most useful to you and your employee.

You can use various methods for coming up with the final narrative for an employee. One method we recommend is for you and the employee to prepare for the review meeting by making notes and jotting down phrases (try this [self-assessment tool](#)) that describe the employee’s performance over the last cycle. Those notes become the basis for the review discussion. During that discussion, you work with the employee to draft a narrative that both of you feel is accurate, fair, and useful for both of you.

For sample phrases and performance narratives, please visit [check out this article](#).

#### *What NOT To Do:*

Neither you nor your employee will reap the benefits of a talent conversation if you sit in your office, write the narrative, and then stick it in front of the employee at the review meeting for his or her signature. This method doesn’t give you and your employee the opportunity to work together to identify goals, solve problems, and maintain an open line of communication.

#### *Where to use the Performance Review Narrative:*

You should create a performance review narrative in the “comments” sections of the following parts of the Performance Appraisal Tool:

- (1) Off-Cycle Review(s), including interim, probationary, and other reviews
- (2) Annual Appraisal

#### Sample Off-Cycle Review Narrative

Date of Review	Interim	Probationary	Other	Supervisor Initials	Employee Initials
12/5/2016	X			LMS	PTP
<b>Comments:</b>	Pat has done a tremendous job taking action on individual goals for this year. Though we experienced an obstacle with funding, Pat was able to scale back the project in a way that would fit the new budget and still provide an elevated level of service. Pat modeled the way by continuing to keep the team focused on results and motivated towards the new direction. In addition, we are thankful for Pat’s successful learning and application of the concepts from the Full Cycle Leadership Goal Setting Workshop for a successful team. Congratulations on experiencing small wins – they add up!				

## Sample Annual Appraisal Narrative

### **SUPERVISOR COMMENTS ON EMPLOYEE'S PERFORMANCE**

Pat continues to perform outstanding work for our office. This year, along with other senior staff members, Pat spent considerable time mentoring our three newest staff members, showing a sustained willingness to explain policies and procedures, tease out options, partner on client contacts, and review documents. Colleagues trust and appreciate Pat's advice and opinions. As a result, our newest staff members have been performing quite well. Pat has made great progress on three procedural guides (two completed, one in final draft stages) and colleagues are already using them to great effect.

Pat has gone above and beyond with providing training and consultations for our office's new system, holding over a dozen small group workshops in assigned departments and performing follow-up presentations on several related topics when it became clear through consultations that other issues or needs were brewing in those areas. Pat has taken the lead in the new program training, helping to coordinate our staff's involvement in the program, and is receiving excellent feedback and glowing comments from participants.

Pat is artful in communicating and working with colleagues, supervisors, students, and other staff on campus, and can be both gentle and firm as appropriate in providing viable options to clients while making sure they are aware of their own obligations and responsibilities. Pat is committed to all parties being treated with respect and given the opportunity to be successful. This year, Pat volunteered to serve as a liaison to three other campus departments in order to facilitate our groups working better together, resulting in clearer and more consistent communication between the groups.

We hope that Pat continues to grow and serve as a positive ambassador of our office to the campus community.