




# 360 Degree Evaluations

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Any company that's going to make it has got to find a way to engage the mind of every single employee. If you're not thinking all the time about making every person more valuable, you don't have a chance. What's the alternative? Wasted minds? Uninvolved people? A labor force that's angry or bored? That doesn't make sense.

Jack Welsh, CEO, GE




# Chinese Proverb

If you want one year of prosperity,  
grow grain

If you want ten years of prosperity,  
grow trees

If you want one hundred years of  
prosperity, grow people

# Goals of the session

- 
- Provide an overview of 360° evaluation
  - Delineate benefits of 360° evaluation
  - Understand issues in conducting 360° evaluation
  - Review pitfalls and loopholes



*What are your  
expectations?*

*Why are you here?*

# Outline

## 1) Introduction

- a) What is 360° evaluation?
- b) Benefits of 360° evaluation

## 2) Doing 360° evaluation

- a) Picking a response set
- b) Picking the question format
- c) Picking questions
- d) Professional tools of the trade
- e) Design issues
- f) Survey analysis
- g) Giving feedback
- h) Some means of self-improvement

## 3) Pitfalls and loopholes



# 360° evaluation working definition

A means of gathering specific evaluative information from a group of people above, below, and on the same organizational level who are knowledgeable enough to rate an individual's performance

# 360° evaluation (1 of 3)

➤ Rather than a judge, you have jury

➤ Jury is made up of

- o Yourself

- o Peers

(for CEO/owners, you nominate peers who know you well)

- o Subordinates

(some are selected, but you never know which ones)

- o Superiors

(for CEO/owners, board of directors are surveyed)

- o Sometimes customers

(campers, parents)



# 360° evaluation (2 of 3)

➤ How many? – usually about 6-12 total

➤ How are they selected?

- Ratee can offer some suggestions, but usually only 3-4 of those are selected.
- Supervisor picks 2-4 people they think would be diverse raters
- Random selection

➤ Questionnaires usually take about 15-30 minutes depending on number of questions

➤ Results are usually tabulated and compiled by an uninvolved third party so reports are anonymous

➤ The Emperor's New Clothes: A parable for 360° evaluation

# 360° evaluation (3 of 3)

Paul

Middle manager / Group leader / Unit head

Engages in all activities with a positive attitude, enthusiasm, and a smile

1 2 3 4 5 6 7 8 9 10

Paul

Subordinates

Peers

Supervisors

Resp	Low	High
--	--	--
6	3	6
4	4	7
2	6	8

## Synopsis of written comments:

- <Sub>When Paul is supervising activities, he is so serious and safety conscious. He really needs to lighten up and be a kid too!
- <Sup>Considering everything on Paul's shoulders, he's doing pretty good.
- <P>Paul does an okay job, but he needs to get out there more and show the staff that he is fun, campy, and can play. Paul is a playful person; I know he has it in him.



➤ Is it revolutionary?

No

➤ Is it valuable?

Yes

➤ Is it done frequently?

No

➤ Is there a right and  
wrong way to do this?

Yes

# Benefits of 360° evaluation (1 of 3)

- Create an atmosphere of constructive dialogue
- There's no one good or bad guy
- Ratings come from a variety of sources and levels
- More honest feedback is likely to occur since personal courage is less a part of the equation

# Benefits of 360° evaluation (2 of 3)

- Increase team performance and employee empowerment
- Supervisors may be surprised that counselors, campers, and perhaps parents have a different view of the employee than they do
- When one gets similar results from several people, it's hard to say that there was just "one bad apple." Seen as more credible.

# Benefits of 360° evaluation (3 of 3)

- Results indicate improved performance over time when:
  - Financial incentives
  - Promotion
  - Personally driven to improve
  - Raters are privy to the general results
- An accurate way to heighten ratees' awareness of their strengths and weaknesses
  - Research shows 2/3 of managers self-appraisals are wrong
  - Cover domains systematically
  - Anonymous, unbiased feedback
  - Cover all the bases – counselors, parents, campers, & administrators
- More than 90% of Fortune 1000 companies use them

# Doing 360° evaluation

- Picking a response set
- Picking the questions and format
- Design and analysis issues
- Giving feedback & means of improvement

# Picking a response set (1 of 3)

- Best to have an “anchor” for every point
  - Verbal description of continuum
  - Example of employee behavior at that level (one e.g.)
- Have “not applicable” and “not enough knowledge to rate” options
- For 360° evaluations, best to have 7 or more response choices. 10 is the most common
- Unbalanced scales tend to confuse, use anchors and 10 point range



# Picking a response set (2 of 3)

Don't Know	Strongly Disagree		Disagree			Agree			Strongly Agree	
N	1	2	3	4	5	6	7	8	9	10

- 9-10  
An exceptional skill. This individual consistently exceeds behavior and skills expectations in this area
- 7-8  
A strength. The individual meets most and exceeds some of the behavior and skills expectations in this area
- 5-6  
Appropriate skill level. The individual meets a majority of the behavior and skills expectations in this area for this job. There is generally a positive perspective toward responsibilities
- 3-4  
Not a strength. The individual meets some behavior and skills expectations in the area, but some fall short.
- 1-2  
Least skilled. The individual consistently fails to reach behavior and skills expectations in this area.

# Picking a response set (3 of 3)

## ➤ Example 7 point scale

- Outstanding
- Excellent
- Good
- Satisfactory
- Weak
- Very weak
- One of the worst

## ➤ Example 6 point scale

- Strongly agree
- Somewhat agree
- Agree
- Disagree
- Somewhat disagree
- Strongly disagree

## ➤ Example 5 point scale

- Among the best
- Better than most
- Average
- Worse than most
- Among the worst

# Picking the question format

## ➤ Open ended questions with short answers

- Rich data with examples for review
- Time consuming
- Limited amount of questions one can ask

## ➤ Structured interviews – same as above

## ➤ Survey

- Often very quick
- Data can be computerized and scores calculated
- Respondents feel more anonymous
- Cover many domain areas
- Best to have space for comments if desired

# Picking the questions

- Handout contains three pages of sample questions and domains
- Don't throw in the kitchen sink
  - Questions relate *directly* to job description
  - Questions are *highly* relevant to key organizational objectives
- Take from 15 – 45 minutes. Often 25 minute target
  - Usually around 15 – 30 questions
- Ratee can choose 10-40% of questions asked
  - Pick ½ where ratee thinks will rate well
  - Pick ½ where ratee thinks will rate poorly



# Professional tools of the trade

- SYMLOG: Multiple Level Observation of Groups
  - Based on over 1 million participants. Thorough, but complex
  - <http://www.symlog.com/>
- Multifactor leadership questionnaire
  - Rates on 12 scales and has an individual and team version
  - <http://www.mindgarden.com/>
- Benchmarks: Assessing Leadership Skills and Enhancing the Development Process
  - Covers 16 domains. Several related organizational measures as well.
  - <http://www.ccl.org/products/benchmarks/bmkover.html>
- Emotional Competence Inventory 360 Degree Evaluation
  - Developed by Richard Boyatzis and Daniel Goleman
  - [http://www.eiconsortium.org/eci\\_360.htm](http://www.eiconsortium.org/eci_360.htm)
- Bar-on 360° Emotional Intelligence
  - Developed by Dr. Bar-on and MHS
  - <http://eqi.mhs.com>

# Design issues (1 of 4)

## ➤ Honest feedback usually requires anonymity. Helpers. . . . .

- Raters don't identify themselves at any time  
Computer entry model   or   Secluded drop spot (typed)
- Assurance that comments and responses will be averaged, obscured, and untraceable
- Enough respondents so individuals can't be picked out
- Impartial third party is only person to see raw responses
- Third party is only person to see results and they do the review

## ➤ Communicate intent of 360° process

- Development?
- Promotion? Pay raise?
- Hiring / firing?
- Will results go in employee file   or   be confidential?
- Why is this worth my time? Incentive for ratee to use results?

# Design issues (2 of 4)

## Train raters to give appropriate feedback

- Instruct raters to use examples in written comments when possible
- The number selected is important, but raters should write about times when the ratee was Excellent, Average, and Poor, instead of just selecting Average
- Provide specific, behavioral examples for the response range (e.g. Excellent and Average).  
Anchors.

# Design issues (3 of 4)

## Training raters continued

- Instruct raters to focus on behaviors and performance instead of their relationship (liking) with ratee or the ratee's popularity
- Instruct respondents not to answer if they are not 80% confident in their opinion



# Design issues (4 of 4)

## Selection Recap

### ➤ Who will be the jury?


- Yourself
- Peers
- Subordinates
- Superiors
- Sometimes customers

### ➤ How many? – usually about 6-12 total

### ➤ How are they selected?

- Ratee can offer some suggestions, but usually only 3-4 of those are selected.
- Supervisor picks 2-4 people they think would be diverse raters
- Random selection

# Survey analysis issues

- 
- If there is a high and low outlier – eliminate them
  - If there are over 25 questions, consider using consistency checks (similar question asked again)
  - Examine
    - Average
    - Distribution
      - How many people ranked ratee on each utilized scale point
    - High score
    - Low score

# Giving feedback (1 of 4)

## Part of thirds

- **1/3 are accurate** (in-line with views of others)
  - ❖ Most effective
  - ❖ Usually well-liked and respected
- **1/3 rate themselves higher**
  - ❖ Least effective and liked
  - ❖ Usually people high up in organization
- **1/3 rate themselves lower**
  - ❖ Very well-liked
  - ❖ Often not very effective

# Giving feedback (2 of 4)

## Using the S.W.O.T. method

### Strengths

Scored well in these areas. Celebrate them.

### Weaknesses

- Examine lowest scores on an item and domain level
- Attempt to determine root cause(s) from written comments and Socratic questioning
- Identify times and behaviors when higher and lower on same point

### Opportunities

- Means of improving ratee's performance
- Identify gaps in ratings and determine why

### Threats

- Examine interactions among strengths and weaknesses for threats to high performance
- Very specific to individual. E.g. = Situation is not quite right (aspects of job need to change, wrong career choice, issues in personal life, et cetera)

# Giving feedback (3 of 4)

In the proper hands, it is not confusing

- Be specific
- Target 5-7 “take home” points
- Use chart method (slide 10) with analysis points (slide 26) to go over results.
- Write a paragraph and bullet point summary the ratee can keep and reference
- Decide what will be acceptable evidence of change and try and speak in terms of actual behaviors
- Use the S.W.O.T. method
- Set a time to meet again soon to further discuss evaluation and break appointment if it later seems unnecessary

# Giving feedback (4 of 4)

## ➤ If done poorly, can create resentment

- Protect anonymity  
Who said that about me? Did they really say that!?
- Use for development  
*Honestly* have both the person's and organization's benefit in mind
- Goal is to help ratee improve, not bash them

## ➤ Helpful if new employees are given 360° evaluation questions they will be held to

## ➤ Be wary of using organizational averages (norms)

- Can create competition and rating others lower
- Focus should be on individual development and not the score in relation to others



# Some means of self-improvement

- Pick a few and concentrate on those
- College course on weak area
- Seminar / Brief training course
- Self-help books
- Personal coach
- More feedback

# Pitfalls and loopholes (1 of 3)

## ➤ Most willing = least needy

- Oblivious
- High self-raters – think they are doing great!

## ➤ Used to nail an individual or group

## ➤ Time famine

- Recognize doing everyone is extremely difficult
- Spread evaluations out over time
- Consider doing select groups

E.g. administration and groups which need development



# Pitfalls and loopholes (2 of 3)

- Utilize 360° but raters see little or no change  
Use it or lose it
- People not trained in giving and receiving feedback
- Failure to recognize the demands of the situation – Fundamental Attribution Error
- No action plan, steps, and timeline for following up on evaluation and growth opportunities
- Your best friend and worst enemy both rate you



# Pitfalls and loopholes (3 of 3)

If you go into this with the idea that the higher up on the food chain you are, the more accurate your assessments are (in other words, if others' ratings don't agree with me, they're wrong), you've missed the boat completely



➤ Is it revolutionary?

No

➤ Is it valuable?

Yes

➤ Is it done frequently?

No

➤ Is there a right and  
wrong way to do this?

Yes



# *Questions*

*&*

# *Discussion*



# *Appendix*



# Sample 360° Evaluation Domains & Questions

Several items are asked in different ways. This provides you with a broader understanding of how different scales might tap the same aspect. In total, these statements and questions are meant to provide you with a feel for the scope and nature of 360 degree evaluations.

## ⑩ Communication

- Is able to communicate in a crisp, clear, and articulate manner
- Clearly communicates needs and expectations
- Is straightforward in communicating with you
- Is abrasive
- Is inappropriately blunt
- An effective listener
- Shares information openly and candidly
- Nurtures healthy communication toward you
- Works well with coworkers
- Shows a genuine concern for campers, develops positive rapport, and uses effective listening skills with campers
- Maintains ability to communicate and work with staff

# Sample 360° Evaluation Domains & Questions

## Interpersonal

- Is trustworthy
- Has a temper
- Displays appropriate self-control
- Is generally flexible
- Accepts constructive criticism of his/her/your work performance
- Is friendly and easy to approach
- Is tactful
- Addresses conflict appropriately
- Is honest
- Is opinionated
- Is overly demanding
- Effectively works through differences which may occur
- Shows sensitivity to the values of others
- Shows sensitivity to the needs of others
- Puts her/himself in others' shoes and understand the feelings and motivations of others
- Deals effectively with pressure and emotions of other individuals
- Is kind
- Loyal to others – doesn't say something to one's face and something else behind one's back
- Apologizes when it is appropriate
- Does not display an "I know what's right attitude"
- Strives to understand others before seeking to be understood
- Works toward "win-win" outcomes

# Sample 360° Evaluation Domains & Questions

## ⑩ Time management

- Spreads your/her/himself too thin
- Efficient use of time
- Follow-up in a timely fashion
- Adhere to schedules
- Is effective in setting priorities
- Manages his or her time well
- Is well organized in his/her work
- Completes work assignments on time
- Is effective in following through on commitments
- Separates action that produces useful results in real time from mere activity or busy work. Works smart

## ⑩ Service / quality / performance

- Committed to camper satisfaction
- Treats staff with respect
- Makes suggestions to improve quality and productivity
- Carefully reviews work before it is submitted
- Exhibits standards of high quality
- Sets an example by working hard
- Initiates new and better ways of doing work
- Is creative in finding solutions to problems
- Is a “self-starter”



# Sample 360° Evaluation Domains & Questions

- Works beyond the minimal requirements of assignments
- Shows extra initiative
- Overcomes obstacles to get the job done
- Is willing to do more than his or her share of the work
- Engage in all activities with a positive attitude, enthusiasm, and a smile
- Create a fun and safe environment for campers
- Shares responsibility with co-leaders when needed
- Keeps a genuinely positive and dedicated attitude towards camp
- Respond to requests and needs of staff in a timely manner
- Conducts his/herself in a manner appropriate to camp and as a role model
- Brings love, positive rapport, support and genuine care to the program
- Actively participates in all camp events
- Displays an inner urge to apply talent and information

## ⑩ Leadership

### Team / Motivation

- Is receptive to suggestions for changing and improving the way work is accomplished
- Encourages team members to work together
- Gives others recognition for their team contributions
- Is effective in working as a team member
- Is effective in following through on teamwork responsibilities
- Is effective in reducing tension in the work group
- Backs others in tough situations when they need it
- Respond to requests and needs of staff in a timely manner
- Energizes others to accomplish their business objectives
- Inspires people to work toward achieving the mission
- Is fair in his or her dealings with people
- Recognizes and rewards good ideas

# Sample 360° Evaluation Domains & Questions

- Recognizes people for doing a good job
- Guides, directs, and motivates subordinates
- Delegates tasks appropriately
- Encourages and supports others to take on added responsibility, authority, and accountability
- Sets and monitors performance goals for self and others
- Initiates dialogue with subordinates
- Takes initiative to organize the group in ways that are suitable to the task
- Encourages people to express their views, suggestions, and reactions – especially people who appear withdrawn
- Uplifts the spirits of the group when snags and setbacks occur, so that challenges do not demoralize the group's initiative and energy
- Provides the resources necessary for team members to achieve their goals
- Provides frequent performance feedback to team members
- Praises team members regularly
- Attracts other people and their resources to the organization
- Stretches the ability of others
- Uses a “pull” style of influence that attracts and energizes people toward the goal

## Cognitive ability

- Demonstrates good judgment
- Demonstrates critical thinking skills



# Sample 360° Evaluation Domains & Questions

## Insight and proactive

- Establish plans to meet future needs
- Anticipates problems before they happen
- Recognizes and responds effectively to unexpected situations
- Handles crises and stress calmly and effectively
- Manages his/her concerns rather than just griping about them
- Accepts responsibility for his/her shortcomings rather than blaming others
- Demonstrates willing and ability to learn and grow personally and professionally
- Seeks out feedback regarding performance
- Draws attention to behavior that is undermining group effectiveness
- Draws attention to available resources and assists in their introduction
- Keeps up to date on competition and trends
- Acquires new skills that will serve the mission. Seeks new information.
- Anticipates and avoids problems. Does not have to constantly fight fires because crises are avoided

## Role model, ability, and visioning

- Sets an example by working hard
- Leads by example
- Displays appropriate self-confidence
- Sets standards to achieve high quality results
- Has your confidence
- Clearly communicates vision and mission in words and deeds
- Sees the big picture; knows how their job and department affects the organization
- Portrays an image of the desired state of affairs that inspires action, determines behavior, and fuels motivation
- Makes people feel that what they do has meaning and significance in regard to the success of the organization

# Sample 360° Evaluation Domains & Questions

## Skills / knowledge / domain areas

- Learns new responsibilities quickly
- Demonstrates thorough knowledge and understanding of \_\_\_\_\_
- Is creative in developing new ideas
- Recalls and appropriately uses a mass of learned skills and data about the world
- Understands, teaches, and enforces safety regulations
- Provides adequate supervision and guidance of campers
- Takes care with camper health needs
- Possesses ability to observe behavior, assess appropriateness, enforce appropriate safety regulations and apply appropriate management techniques
- Sets an example by waking up on time
- Gets to know each camper in his/her group well
- Integrates all members of the cabin
- Sets appropriate limits at beginning of session and maintains order within cabin
- Recognizes and responds to problem-solving opportunities in cabin and camp in general
- Demonstrates effective written skills



# Sample 360° Evaluation Domains & Questions

## ⑩ Organizational climate

- To what extent are you encouraged to develop new ways to do your job
- To what extent are you allowed to make decisions to improve the way you perform your job
- To what extent are you willing to put forth additional effort to increase your contribution
- To what extent are people encouraged to be creative in their jobs
- To what extent are you satisfied with the amount of information you receive
- To what extent do you have the opportunity to express your suggestions regarding policies and procedures
- To what extent do we operate efficiently
- To what extent do we seem to be changing for the better
- To what extent are people at your level free to take independent actions that are necessary to carry out their responsibilities
- To what extent are you sufficiently aware of things happening that might affect how you do your job

## ⑩ Open ended

- What do you like best
- What do you like least
- Are there any other changes you would suggest
- What were your/his/her most important accomplishments
- What were your/his/her most important setbacks and opportunities to learn
- For \_\_\_\_\_, to reach the next highest level in this rating, what would s/he have to do

# Chicken Soup for the 360'ed Soul

Performance appraisals are like seat belts. Everybody agrees they're a good idea, but lots of people find them awkward to use. Every company has a system; few extol the system they've got. Most managers loathe doing appraisals — if they thought they could get away with it, they'd skip the repulsive chore completely. They feel it's a process that only terrorizes appraisees and enriches lawyers.

Still, everybody wants the things that a reliable performance appraisal system can deliver — clear and specific goals so people know exactly what's expected; solid information on just how well they're doing; senior management's awareness of the contributions they've made; data on where they're doing a great job and where some shaping up is needed; fair and equitable pay for performance; and a thumbs-up attaboy when they hit a home run. That's what a good performance appraisal system can deliver.

\*\*\*\*\*

Okay, so you're into control, but everybody knows that you're only a curmudgeon on the outside, that you really have a warm, fuzzy spot in your heart for everyone. You might be that way, but don't be too sure everybody -- or even anybody -- knows.

Marc Breslawsky, head of the 8,000-employee office systems division at Pitney Bowes, didn't expect much from the feedback process, but he was curious about what employees thought of him. He found out that they viewed him as a man with little warmth who made cold, hard business decisions. "I assumed they knew I was pleased" he says. "I didn't pat people on the back. I didn't say thank-you. That wasn't my style. And if I had something difficult to discuss with someone, I didn't temper it by discussing their good parts. They felt I didn't care about them."

# Chicken Soup for the 360'ed Soul

His behavior, unfortunately, was infectious. "A lot of people saw me like that, and they treated their people that way." Now he's virtually a poster boy for feedback. "I started telling people what they do well and being more open in my discussions, and the results have been amazing." Teamwork is up, he says, and the time it takes to develop new products has been cut in half. Like many top bananas who experience big benefits from feedback, he wants his managers to go through the process too.

Similar news awaited Donald Boudreau, an executive vice president in charge of branch banking at Chase Manhattan Bank. Disciplined, demanding, smart, sometimes intimidating, not a back patter. Most surprising of all: "Almost universally, people said I didn't have a sense of humor." He disagrees, but understands why people might think that: "I have one, but apparently I hide it."

Chuck Krogman felt his 360-degree review was more accurate than other evaluations he had received. "I got much more honest feedback than I'd ever gotten from a one-on-one review," he said.

And Hewlett-Packard materials manager Karen Hensey said her experience with 360 provided a kind of validation she wouldn't have received from an old-fashioned review by her boss. "The surprise came from the consistency of the feedback from totally unrelated sources, particularly on my strengths," Hensey said. "I never felt I was being torn apart. It was very constructive coaching. It was soul-searching but not touchy-feely."

At Intel, Van De Ven recalls how 360 helped her uncover and solve a personnel problem that might otherwise have festered for years.



# The part of thirds

How do managers rate themselves? Only about a third produce self-assessments that generally match what co-workers concluded. Another third -- called "high self-raters" have an inflated view of their talents, says Ellen Van Velsor, a researcher at the Center for Creative Leadership. The remaining third rate themselves lower than co-workers do.

An oversize ego, it turns out, is murder in a manager. Almost invariably, the high self-raters are judged the least effective by coworkers, says Van Velsor. And yet, for reasons she can't entirely explain, high self-raters are more common high up in organizations than down low. "It could be that the higher they go, the less feedback they get, so their view of themselves gets distorted. Maybe they're being judged by a higher standard. And maybe they're just more self-confident than managers who don't reach senior positions."

Van Velsor says that on effectiveness, the self-doubters actually get better scores from co-workers than do the other two groups. She figures they probably work harder and rely more on others. But Paul Connolly, president of Performance Programs Inc., a feedback firm in Connecticut, thinks the strongest managers are the ones who size themselves up about right. Says he: "People with a good sense of their influence and effectiveness will use it to their advantage. The ones with the low self-image make people scurry around and waste a lot of effort."