Building Your Evaluation Template

By *Robert C. Gergen*, DTM

District 8 *2005 & 2007 Evaluation Champion*

What is a pattern, and why do we use patterns?

Author Malcolm Gladwell in his book "***Blink***", explores how and why people can make snap decisions, and quite often, it comes down to patterns or templates that free our minds of all the clutter and repetitive noise that prevent us from absorbing as much information as possible.   Why do experienced drivers react and avoid accidents that learners don't?   It's the patterns and templates we learn to use, even if we aren't consciously thinking of them.   Competing in Speech Contests as a Toastmaster, I found I excelled as an evaluator.   I also discovered that the process was the same, whether I was evaluating performance as a speaker or any other behavior.

As a Toastmaster one is quickly acquainted with the "sandwich method" when learning to evaluate speeches.   I soon found that this is simply one of the beginning techniques of the process of building your own personal evaluation pattern.   Notice I did not say "Speech Evaluation Pattern" but "Evaluation Pattern" because if you build your template properly it will work for all evaluations with only minor modifications.

On the following page is my printed "*template*" for evaluations.   Feel free to use it as a starting place to develop a "*template*" that works for you.   I have found that for me, I can, with minor modifications, use my "*template*" to give other types of evaluations including performance appraisals.

How I use this "*Template*"

Once we dispense with the identification/heading information we come to

The most important piece of the evaluation…

> **The Objectives**: "***Were the objectives met?***"   No matter what you are evaluating the most important thing is if the objectives were met.   If they were not you need to let the person know!

Next is the "process specific" information.   (**NOTE:** *This section is the only one I consider task specific.*)

> ### For a Speech Evaluation
>
> > **Open:**   How did you begin the speech?   What did you do to grab my attention?   Have you established your objectives?
> >
> > **Body:**   Did the speech flow?   Did you stay on topic?   Did you hold my interest?
> >
> > **Close:**   How did you drive your message home?   Did you summarize your thoughts?   Did you wrap the speech up or leave some things unfinished?   Did you put the cherry on the shake?
>
> ### For a Performance Appraisal
>
> > **Job Description:**   What are the duties listed in the person's Job Description.   (**NOTE:** *If the person's duties have changed they should be reflected in their Job Description.   You can't hit a target, on a regular basis, unless you can see it.)*

What the person being evaluated looking for.

> **Strengths:**   First I list the three things that I felt were your greatest strengths as displayed accomplishing their assigned tasks.
>
> **Alternatives:**   I then list two suggestions for upgrade or alternative styles of accomplishing something.

Area to catch anything not covered and Reminder to Close.

> **Summation:**   For your written evaluation I use this to include any information that might not have been covered elsewhere in this document.   (**NOTE**: *This is a rarity; I seldom need to use these lines for this purpose and if I do include them in my oral presentation I usually mention this prior to presenting the last strength.*)   This section is primarily a reminder to close by summarizing when you're presenting this information orally and to help organize the process.   Be concise and encouraging

I use a blank piece of paper or a "Mind Map" to collect my thoughts and notes, list strengths, areas for alternative approaches and jot down supporting information specific to my points.   I find if I don't write them down I will forget them.   Once I have completed my thoughts I rank the strengths and alternatives so I can fill in the template.   I limit strengths to the top three and alternatives to the top two.   I'm not creating a laundry list here and short lists have more power.   I am now ready for my oral evaluation.

Orally I follow my template with only one exception; I save the strength I perceive as being the strongest until right before my conclusion in order to end on that "sandwich method" positive note, and to maximize my chances of connecting with the person being evaluated.

Good Luck and Improved Evaluations!

Speaker: _____   Title: _____

District ___   Division ___   Area ____   Club _____

Theme: _____   Meeting Date: _____   Location: _____

Evaluator: _____

Objectives: _____
_____
_____

Opening: _____
_____
_____

Body: _____
_____
_____

Close: _____
_____
_____

Things I felt were exceptional: Liked best   (LB's)

Move the greatest strength to just prior to the Summation

1. _____
Example _____
How/Why _____
_____

2. _____
Example _____
How/Why _____
_____

3. _____
Example _____
How/Why _____
_____

Things I felt could have been improved: Next Time   (NT's)

1. _____
Example _____
How/Why _____
_____

2. _____
Example _____
How/Why _____
_____

Summation: _____
_____
_____

Speaker: _____   Title: _____

District ___   Division ___   Area ____   Club _____

Theme: _____   Meeting Date: _____   Location: _____

Evaluator: _____

Objectives: _____
_____
_____

Opening: _____
_____
_____

Body: _____
_____
_____

Close: _____
_____
_____

Things I felt were exceptional: **Liked best**   (LB's)

1. _____
Example _____
How/Why _____
_____

2. _____
Example _____
How/Why _____
_____

3. _____
Example _____
How/Why _____
_____

Things I felt could have been improved: **Next Time**   (NT's)

1. _____
Example _____
How/Why _____
_____

2. _____
Example _____
How/Why _____
_____

Summation: _____
_____
_____