

Performance Assessment Best Practices



Kyle J. Stiemsma | Director
Greyson Orellana | Assistant Director

PEPPERDINE



The Making of a Manager

Julie Zhuo

“This is the crux of management: It is the belief that a team of people can achieve more than a single person going it alone. It is the realization that you don’t have to do everything yourself, be the best at everything yourself, or even know how to do everything yourself. Your job, as a manager, is to get better outcomes from a group of people working together.”



2021 Staff Climate Survey

- My supervisor regularly provides me with fair, accurate, and constructive feedback about my job performance.
- My supervisor and I have identified goals that contribute to my professional development.
- Poor performance is not tolerated in my department.

Feedback

- **Set Clear Expectations**
- **Praise Strengths**
 - Cite an example
 - Specify why performance/behavior was exceptional
- **Clearly Address Opportunities for Growth**
 - Cite the issue
 - Specify why the issue is problematic
 - State your expectation going forward
- **Meet Regularly, Give Feedback Constantly**

AVOID



ASPIRE



Feedback (cont.)

- **Not always formal, but continuous**
 - Deal with small items/matters immediately
 - Loop in Human Resources for larger performance and/or behavior concerns
- **Always send a follow-up email after a discussion**
 - Continuous documentation

AVOID

IT'S TIME FOR OUR ANNUAL
PERFORMANCE REVIEW. HERE'S
HOW YOU'VE BEEN DOING FOR
THE **PAST YEAR**...



ASPIRE

CAN I SHARE SOME **FEEDBACK**
FOR YOU FROM THAT MEETING
THIS **MORNING**?





Annual Assessments

- Due to Human Resources by August 5
- Assessment Form
 - University-sponsored form (HR website)
 - Form of your choosing
- Accurately represents performance and behavior
- Consider the overall rating
- Merit increases reflect performance assessment



Why do we need to do assessments?

- Development
- Motivation
- Communication
- Legal Compliance
- Fulfills a Promise



Elements of an Effective Assessment

- Timeliness
- Specificity
- Accuracy
- Objectivity
- Job Description / Duties
- Discussion

Performance Assessment Portal

PEPPERDINE | Employee Assessments

Welcome to Pepperdine's performance assessment portal!

[Log in to the Assessment System](#)

Our University will only ever be as good as those who work toward its mission each day. We expect staff to find great meaning and purpose in their work of furthering Christian higher education to prepare students for lives of purpose, service, and leadership.

Regular performance assessments not only help promote excellence in service of our mission, but also provide employees with avenues for growth. Pepperdine seeks to provide a work environment in which staff have the opportunity to increase their leadership capabilities, expand their scope of responsibility, and refine their craft. We believe that work is a meaningful dimension in people's lives, and Pepperdine staff are owed feedback to help them enjoy meaningful and successful careers.

Please let us know how we may assist you in the performance assessment process, and thank you for your contributions to Pepperdine University.

Human Resources
(310) 506-4397
humanresources@pepperdine.edu

performance.pepperdine.edu



Performance Assessment Portal

PEPPERDINE | Employee Assessments

Welcome Greyson Orellana | [Logout](#)

[Templates](#) [Delegate Access](#)

My Employees' Assessments








Start a new assessment

Previous Years' assessments

Bulk Print

Download

Search:

Employee  Name	Fiscal  Year	Assessment  Type	Overall  Score	Current  Step	Signer 	Signer email	Completed  Date	Bulk Print <input type="checkbox"/>
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Name	Year	Type	Score	Step			Date	



Performance Assessment Portal

New Employee Assessment

Employee Name

Orellana, Greyson (100493657)

Approval Flow

1. Supervisor Rating

Stiemsma, Kyle (100588093)

2. Department Manager Review

Phillips, Sean (011737084)

3. Supervisor Final Review

Stiemsma, Kyle (100588093)

4. Employee Review

Orellana, Greyson (100493657)

5. Complete

Assessment Details

Fiscal Year 2022

Assessment Type

Annual

Would you like to:

Launch New Assessment

Create Assessment from Previous Template

Choose Assessment:

Standard University Assessment

Create Assessment



Performance Assessment Portal

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Greyson Orellana - Standard University Assessment

Year 2022

Review Type

Annual

Interim

Overall Score

0

Quality of Work

Quantity of Work

Job Knowledge

Communication Skills

Judgment

Interpersonal Skills

Initiative

Approach to Work

Public Contacts

Professionalism

Mission

Supervision

Overall Comments and Goals

+

[Helpful Links](#)

Accuracy and Precision	<div>Rating<div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Not Rated</div></div>	<div>Weight<div>1.19 %</div></div> <div></div>
Thoroughness	<div>Rating<div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Not Rated</div></div>	<div>Weight<div>1.19 %</div></div> <div></div>
Reliability	<div>Rating<div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Not Rated</div></div>	<div>Weight<div>1.19 %</div></div> <div></div>
Neatness	<div>Rating<div><div></div><div></div><div></div><div></div><div></div><div></div></div><div>Not Rated</div></div>	<div>Weight<div>1.19 %</div></div> <div></div>



Performance Assessment Portal

Neatness

Rating

Not Rated

Weight

1.19 %

Supervisor Comments (Kyle Stiemsma)

Department Manager Comments (Sean Phillips)

Employee Comments (Kyle Stiemsma)

Show Approval Flow

Attachment

Add...

Next

Save Changes

Add Assessment Item ▾

Return to the previous step of the review

Proceed to the next step of the review

Return to Home



Performance Assessment Portal

Quality of Work

Quantity of Work

Job Knowledge

Communication Skills

Judgment

Interpersonal Skills

Initiative

Approach to Work

Public Contacts

Professionalism

Mission

Supervision

Overall Comments and Goals

+

[Helpful Links](#)

Development Plan

Goal *(What do you want to achieve?)*

Measure *(How will you know that the goal was successfully accomplished?)*

Value *(Why will this goal benefit Pepperdine?)*

The Dirty Dozen

1. Late Evaluation
2. Over-Evaluation
3. Timing Issues
4. Inconsistency
5. “Like Me” Bias
6. Stereotyping



The Dirty Dozen (cont.)

7. Labels
8. Absolutes
9. Evaluating Intent
10. Referencing Protected Absences
11. One-Sided Narrative
12. Absence of Goals



The Evaluation Meeting

- Prepare
- Be honest with compassion
- Ask questions
- Listen
- Be helpful
- Manage the energy



Frequently Asked Questions

- What happens if the employee refuses to sign the evaluation?
- What if I am a new supervisor and have not had a full year to evaluate performance?
- What if the employee disagrees with the evaluation?
- How do I evaluate employees on extended leaves of absence?
- Who needs an assessment?



Frequently Asked Questions

- Can I ask others to be present when I present the assessment?
- What happens if my employee is working remotely?
- Should I give any considerations for work done during the pandemic?
- How much time should I spend in the evaluation meeting?
- Can I give cost of living increases?

Questions?

Contact Human Resources (x4397)

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