Performance Assessment Best Practices

Kyle J. Stiemsma | Director Greyson Orellana | Assistant Director



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 and Performance Assessments

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

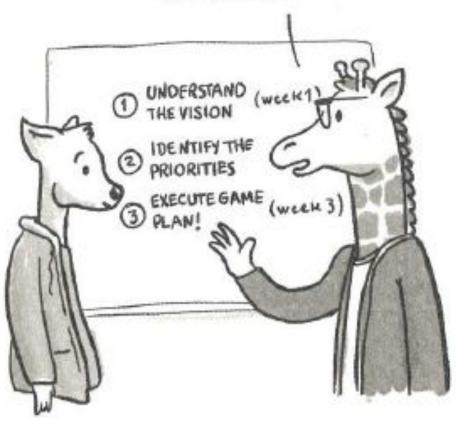
AVOID

OKAY, THIS IS EVERYTHING WE NEED TO DO.



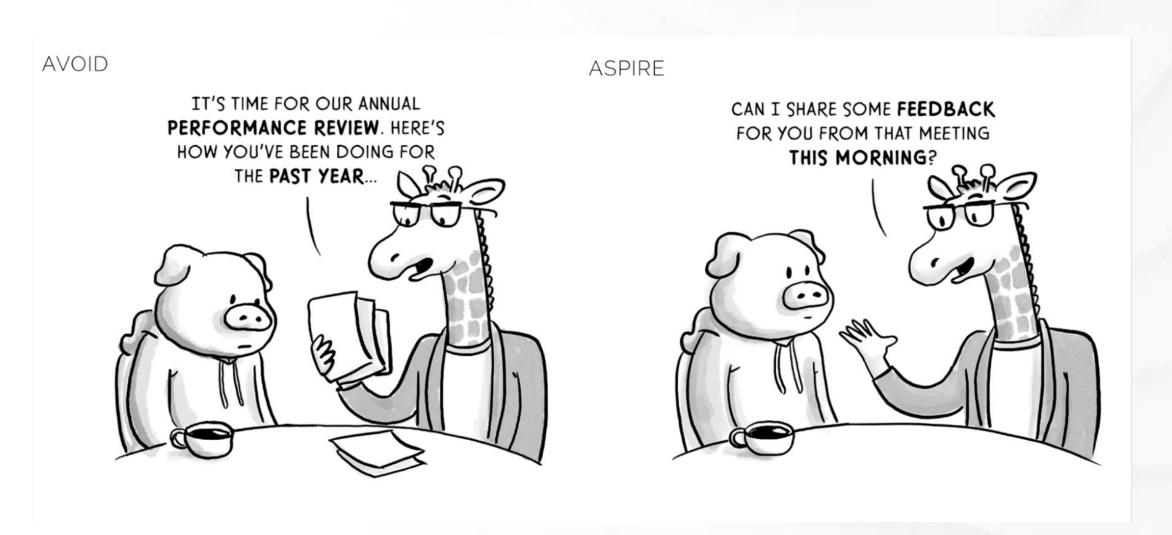
ASPIRE

OKAY, THIS IS OUR PLAN OF ATTACK.



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



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



PEPPERDINE | Employee Assessments

Welcome to Pepperdine's performance assessment portal!

each

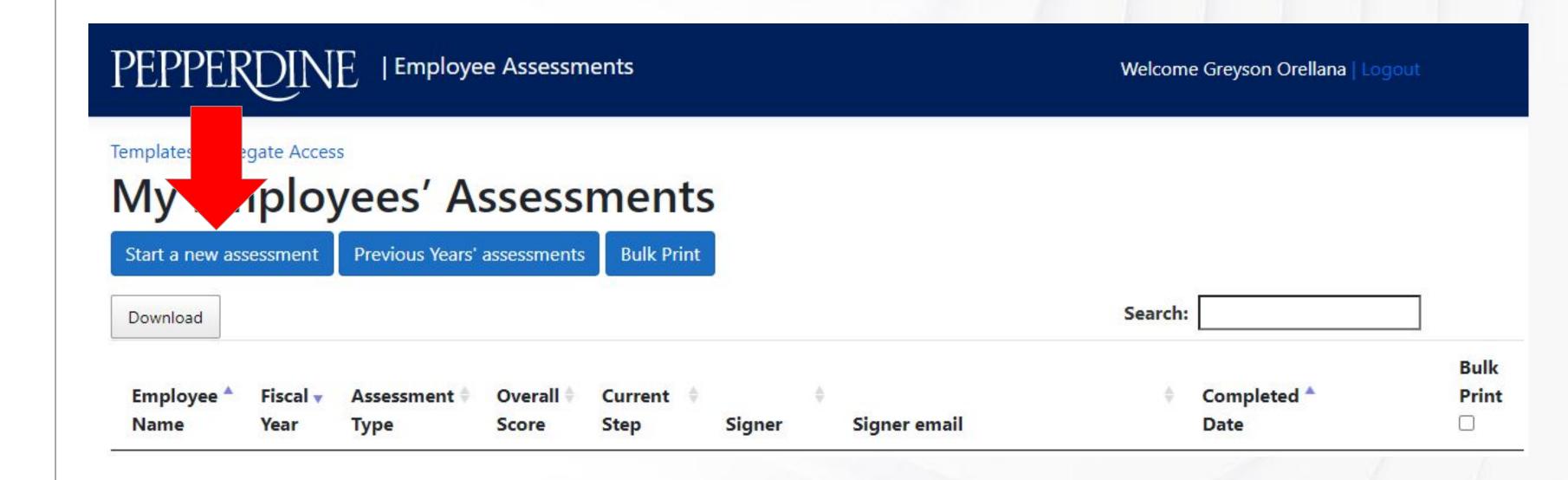
Our University will only ever be as good as those who work toward its mission each day. We expect staff to find great meaning and purpose in their work of furthering Christian higher education to prepare students for lives of purpose, service, and leadership.

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.

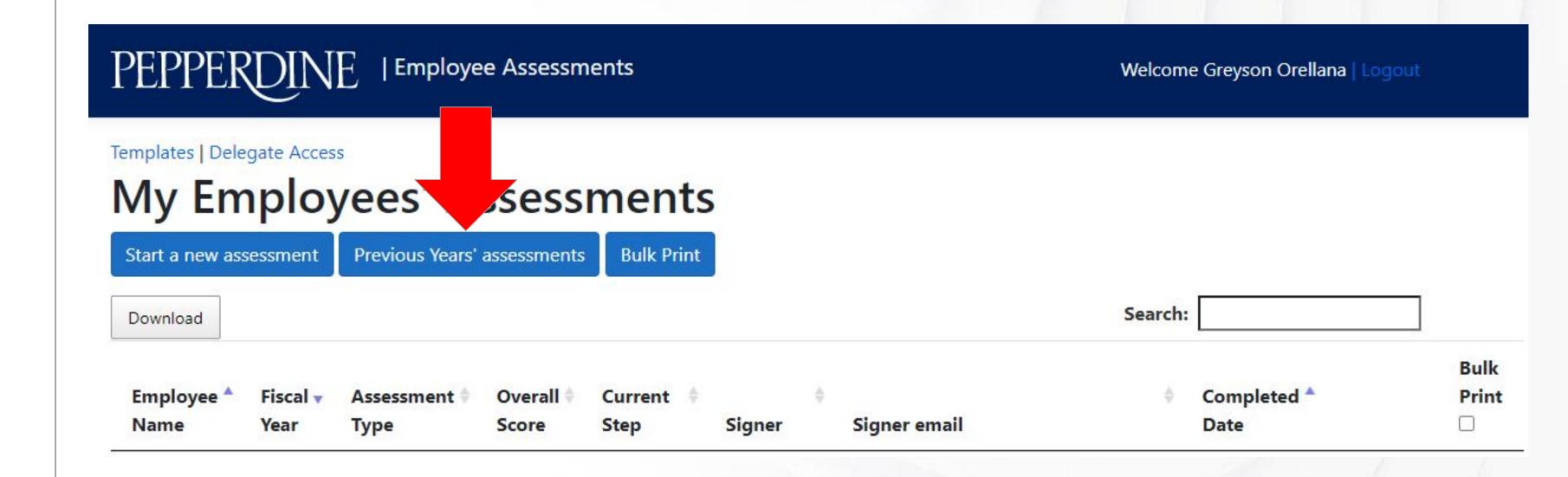
Please let us know how we may assist you in the performance assessment process, and thank you for your contributions to Pepperdine University.

Human Resources (310) 506-4397 humanresources@pepperdine.edu Log in to the Assessment System

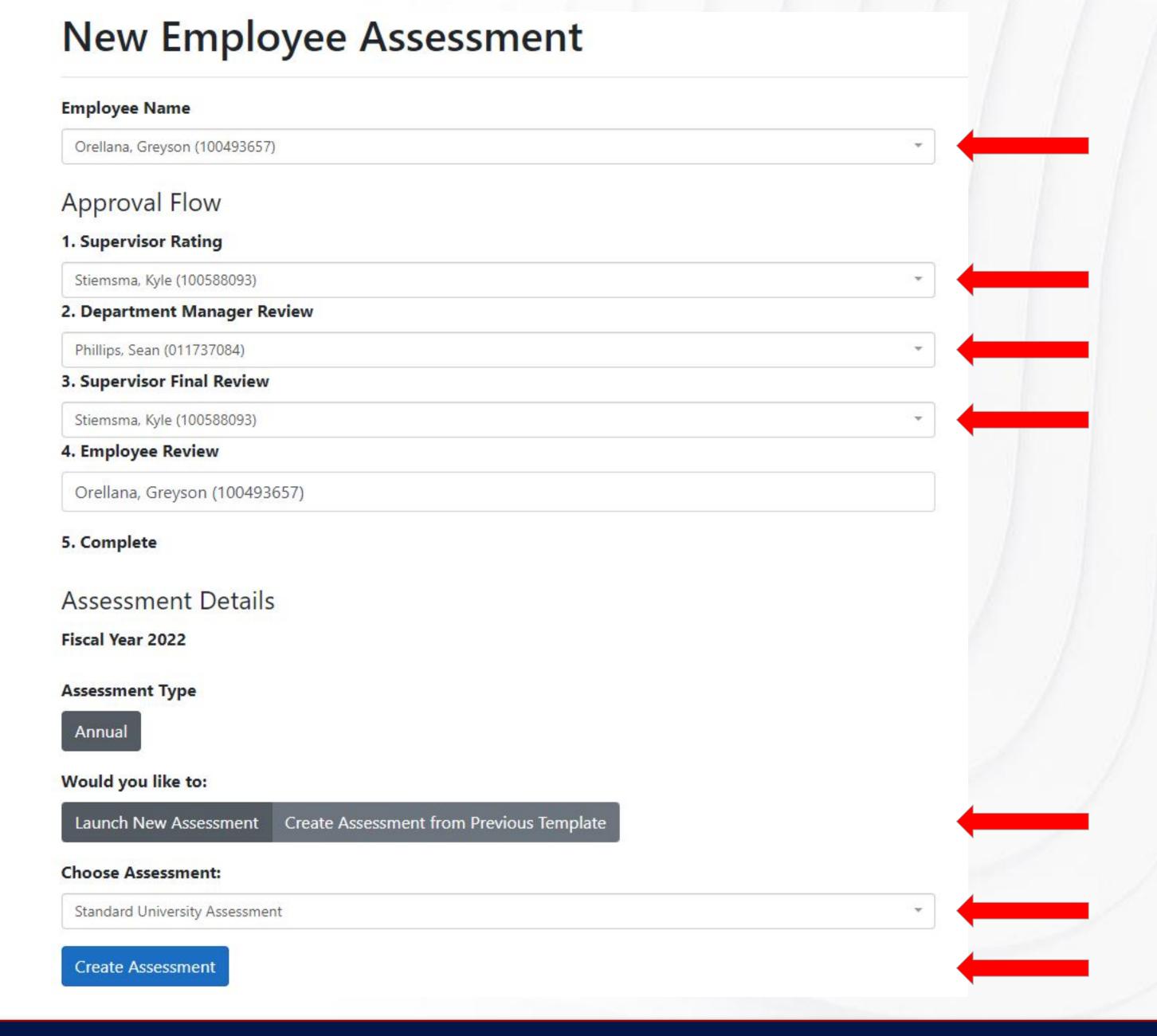
performance.pepperdine.edu



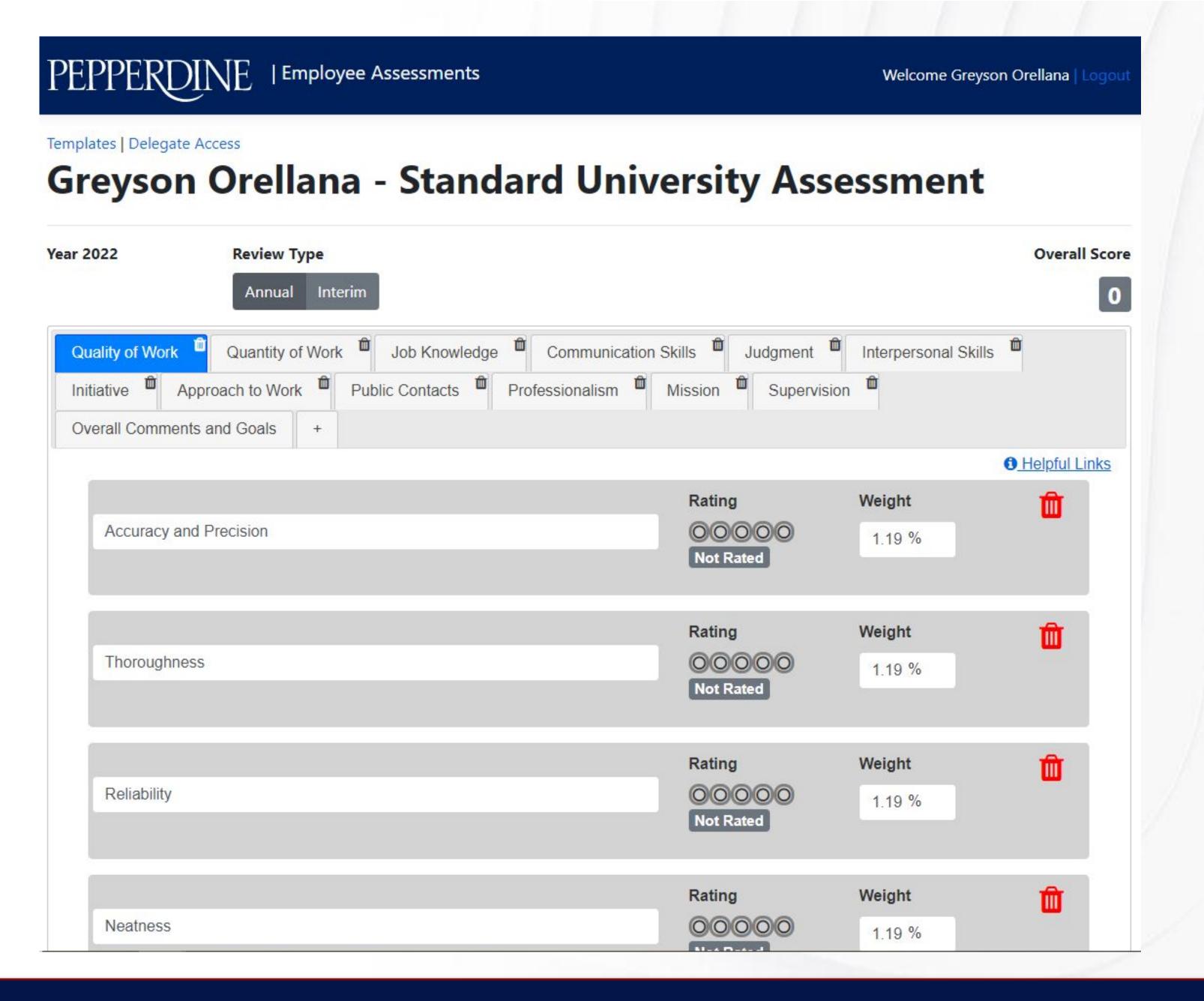




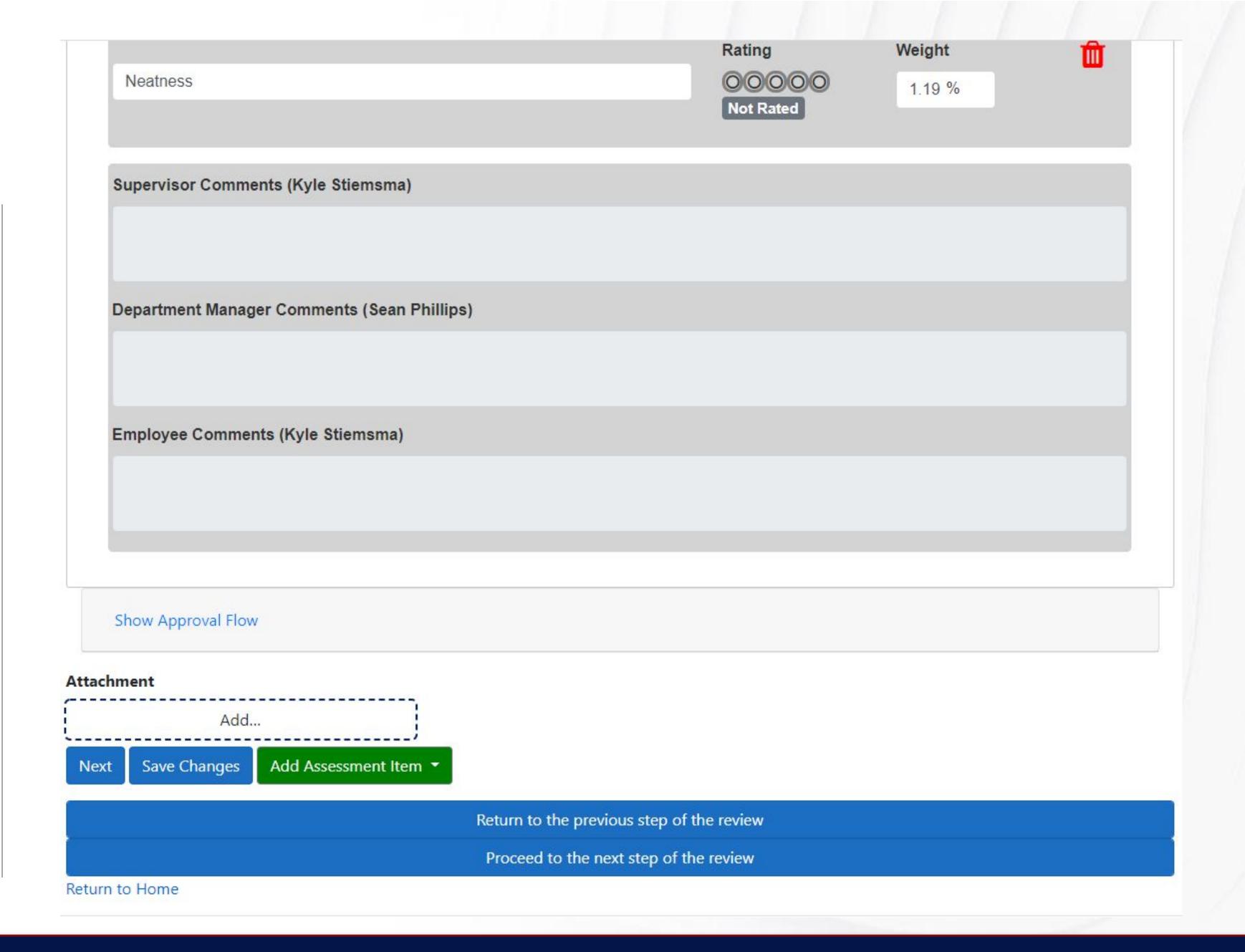




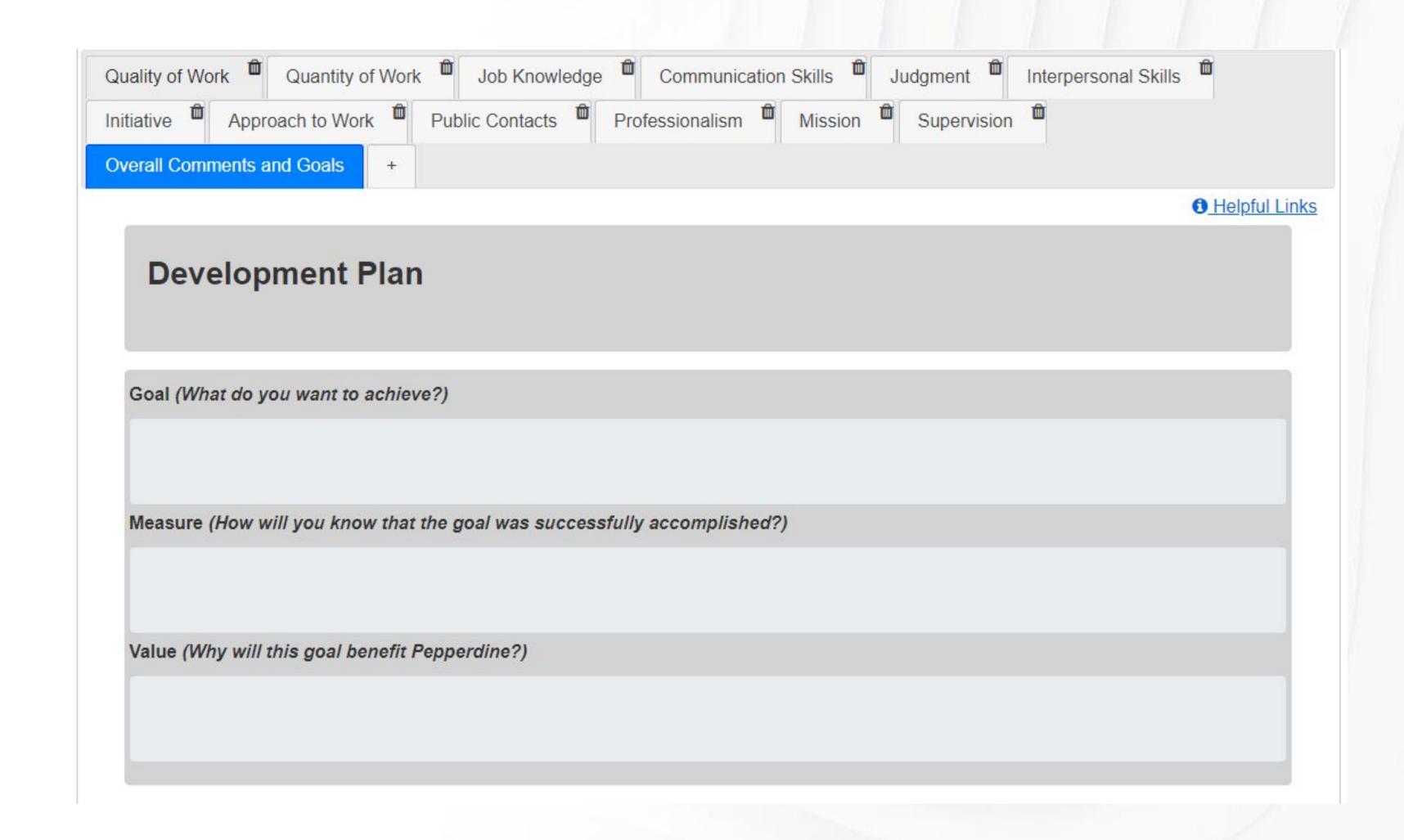












The Dirty Dozen

- 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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