

Performance Assessment & Staff Development

Apr. 15 – July 31

Performance Assessment and Staff Development

An assessment meeting and review is the final step in the annual process. This meeting should generally take place sometime between April 15 and July 31 of each year. The assessment meeting includes an evaluation of annual goal accomplishments and a discussion about staff development. The assessment must be documented on the form included in the back of this manual and the form should be submitted to Human Resources for inclusion in the staff member's permanent personnel file. The forms are also available electronically via the Human Resources web site.

The assessment begins with a review of the agreed upon annual goals.

The staff development component includes a review of the general competencies i.e. the knowledge, skills and abilities that Wittenberg expects of all staff members. Following is the list of competencies that have been identified as critical university performance standards. In addition, supervisors may wish to identify competencies that are specific to their department.

Competency	Characteristics
Quality Enhancement/ Quality Services	❖ Is responsive to deadlines
	❖ Responds effectively to external and internal deadlines
	❖ Keeps current on recent developments in one's field
	❖ Understands and can use appropriate information technology, equipment, programs and services in order to better serve the Wittenberg community
Interpersonal Relations	❖ Works cooperatively with co-workers, supervisor and other key personnel to accomplish tasks
	❖ Is able to manage conflict and deal with stressful situations
	❖ Is fair and consistent in working with diverse members of the Wittenberg community
Advancement of Wittenberg	❖ Demonstrates a working knowledge of Wittenberg's goals
	❖ Contributes to department goals that support the university's strategic plan

Competency	Characteristics
Communication Skills	<ul style="list-style-type: none"> ❖ Effectively uses oral communication skills to convey ideas in a clear and informative manner ❖ Effectively uses written communication skills to convey ideas in a clear and informative manner ❖ Is tactful in oral and written communication ❖ Supports the timely exchange of information between various departments
Productivity, Initiative and Creativity	<ul style="list-style-type: none"> ❖ Effectively organizes and prioritizes own work schedule ❖ Works effectively under general supervision and seeks clarification as needed ❖ Recommends and/or implements improvements in methods, procedures and services
Data Management and Analysis	<ul style="list-style-type: none"> ❖ Adheres to financial and record-keeping procedures ❖ Maintains appropriate documentation ❖ Seeks relevant information to assist in decision-making ❖ Uses analytical skills to review information and formulate alternative courses of action
Leadership, Supervision and Personnel Development <i>(applies to supervisors only)</i>	<ul style="list-style-type: none"> ❖ Readily accepts overall responsibility for projects and tasks ❖ Motivates self and staff to set and achieve goals ❖ Understands the effects of decisions on other departments and co-workers ❖ Demonstrates assertiveness and confidence when a decision is made ❖ Actively seeks a well-trained, qualified and diverse staff ❖ Utilizes staff to ensure that Wittenberg's departmental goals are met ❖ Monitors staff progress and takes effective measures with staff to identify and correct sub-standard progress ❖ Advocates staff development and fosters personal and professional growth

It is not necessary or even desirable to critique a staff member on each characteristic. This should be a discussion, not a test, and ratings should not be assigned. Ratings typically don't provide information that is helpful and usually undermine commitment and impede good communication. Because the impact of rating is usually negative, it is counterproductive to the intention of improving performance. The intent is to recognize a staff member's strengths and also identify areas for improvement or development.

Continuous development and learning is important for all staff members. The supervisor and staff member need to make specific plans and commitments for development and should document these commitments. Attention should be given to the areas for growth or improvement that were identified in the discussion about competencies and to training that will support the goals identified for the upcoming year or benefit the department.

Supervisors should also review and document training and development that was accomplished during the year under review and assess the impact the training has had on the staff member's performance.

Guidelines for Good Performance Assessments

Preparation:

1. ***Begin by reviewing the position description, last year's performance appraisal and goals and any notes from meetings that you may have had with the staff member.***
2. ***Nothing in the performance assessment should be a surprise to the staff member.*** Supervisors and staff should have frequent interactions throughout the course of the year. Performance problems need to be addressed as they occur. Conversely, recognition of good work also needs to be delivered promptly. To keep the lines of communication open, it is important for a supervisor to have regular discussions with his or her staff.
2. ***Keep Notes.*** We tend to remember the most recent and the most significant events during the year. Keep notes on each staff member, for both positive and negative events. When it is time to write the assessment you have "done your homework," which should reduce the time and energy required to prepare the assessment.

3. **Get input from the staff member.** Getting an idea of the staff member's perspective of their own performance allows you to be better prepared to discuss the performance assessment. One way to do this is to ask the staff member to complete and give you a copy of the assessment and development forms in advance of the meeting. There is always the possibility that you may not remember all of the staff member's contributions. This gives the staff a chance to assist you.
4. **Consider writing & requesting notes from other supervisors.** When your staff is involved in a noteworthy event outside your department, you may want to solicit feedback from the other department head(s).
5. **Identify both strengths and development needs.** None of us are perfect, and all of us do some things well. Therefore, make sure to do your best to balance the positive and negative aspects. If a staff member exhibits more negative than positive behavior, disciplinary action should already be in progress.
6. **Comment on progress or lack thereof since the last assessment period.** If you identified specific development actions and goals, address the staff member's progress in each area.