

Conversations On Leadership: Performance Evaluations

Human Resources
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**Many Strengths.
One Mission.**

Agenda

- » Purpose of evaluation
- » Measurement ratings and consistency
- » Writing the evaluation
- » Using comments
- » Goal-setting
- » Delivering the evaluation

Purpose of Evaluations

- » Assess performance to objectives
- » Rate the assessment
- » Provide feedback
- » Solicit feedback
- » Establish new goals
- » Recognition
- » Mentoring

Timing Of Evaluations

- » Annual
- » Anniversary vs. Focal Review



General Measurement Criteria

Option #1

- » Ratings are on a 1-5 scale
- » 1/5 ratings must have comments
- » Understand the measurement of each goal
- » Must be able to support each rating
- » Ratings are not academic (A,B,C,D,F)

Option #2

- » Meets Expectations
- » Does Not Meet Expectations
- » N/A

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Do You Want this Employee on Your Team?

“Successfully meets expectations and established goals. Demonstrates competencies critical to job performance. The individual performing at this level generally performs consistently and skillfully, with only isolated or rare exceptions. The employee sets an example of desired behavior and job performance.”

“Does not demonstrate competencies critical to job performance. Performance is below minimum acceptable expectations, causing a negative impact on departmental effectiveness and productivity. Current level of performance creates burdens for co-workers and/or incomplete work. The employee needs to improve performance immediately.”

“Performance is generally below expectations and established goals are inconsistently achieved. Performance at this level may require co-workers to compensate for gaps in skill or effort. This rating is appropriate for an employee who is just beginning to learn the functions of a new position, whose performance has declined, or who has not shown significant improvement during the rating period.”

“Performance clearly surpasses expectations and established goals. The employee frequently demonstrates exceptional strengths in competencies critical to job performance. Performance is characterized by notable skill, initiative, and superior job knowledge.”

“Consistently and significantly exceeds expectations and established goals. Performance at this level is recognized as exceptional by co-workers, peers, immediate supervisor, higher management and others who are served by the department. The individual suggests and initiates improvements that enhance the effectiveness of the department. Considered a role model to others and makes significant contributions to the success of the department.”

Rationale for Rating Consistency

- » Minimize risk of favoritism and/or discrimination
- » Provides staff with clear benchmarks
- » Gives supervisor ability to rank employees
- » Builds trust

Preparing The Evaluation

- » Schedule time for writing the evaluation
- » Review department file documents:
 - ~ Anecdotal notes
 - ~ Disciplines
- » Review self-eval and multi-rater ratings
- » Score each item, comment as appropriate
- » Save your work and review it the next day
- » Discuss with chain of command as needed

Using Comments

- » Provides support to ratings
- » Clarifies successes and challenges
- » Provides specific written feedback
- » Final comments provide summary of performance, accomplishments, challenges, and future goals

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Comments-Good or Bad?

- » “Prior to her pregnancy leave, Susan did a great job coordinating our quality project .”
- » “The team trusts Kevin and knows he will listen to them and try to help however he can.”
- » “Tina needs to use her chain of command and not call HR every time she has a problem as she has done this past year.”

Comments-Good or Bad?

- » “David is inconsistent in his performance.”
- » “Carole has successfully incorporated and applied skills she’s gained from completing her Critical Care certification program this year.”
- » “Although Jason’s performance deteriorated this year, he is a great team player and wonderful to have on the team!”
- » I would like to see Rachel find and incorporate methods to improve her time management to reduce delayed documentation and unnecessary overtime.”

Establishing Goals

- » Build from department and/or organizational goals and objectives
- » Establish at least two personal and one department/organizational goals for each evaluation period
- » Consider soliciting input from the employee

Smart Goals

- » Specific
- » Measurable
- » Attainable
- » Realistic
- » Timely



Delivering The Evaluation

- » Schedule ahead of time and secure a private location
- » Review the measurement criteria
- » State the evaluation item, the rating, and provide supporting information/read comments as appropriate
- » Ask for questions
- » Discuss goals
- » Offer recognition, appreciation, and encouragement for the next year
- » Remind employee to sign evaluation
- » Provide copy of evaluation to employee

Additional Tips

- » Send multi-raters for full-spectrum feedback (lovers, haters, unknown)
- » Protect the anonymity of multi-raters
- » Be prepared to discuss what a higher rating looks like, smells like, sounds like, etc...
- » Be familiar with what you want to communicate
- » Own your feedback

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Employee Profile

- » Administrative Assistant
- » Date of Hire: 4/5/2010
- » Full Time, Day Shift
- » Evaluation Period: 4/5/2014-4/5/2015
- » Has received students/staff compliments for her kind and gracious demeanor at least once a month.
- » Had three occurrences of untimely project completions.
- » Coworkers, families and patients have commented on Nancy's quick smile and sense of humor.
- » Received a Written Warning for excessive absences (84 hours) on 3/27/2014.
- » Uses Chain of Command when necessary.
- » Organized unit potlucks for coworkers' baby showers and holiday parties.
- » Co-workers identify that she provides excellent hand-off/report; always helps coworkers with their patients/families.
- » Led morning devotional once each quarter.