

A Better Way To Do Evaluations



By Rodney W. Pease

Director of Student Administrative
Services

Western New England College
Springfield, Massachusetts



Why

- I just hated the way we used to do it.
- Once a year was just not enough.
- Setting silly, useless goals.
- No follow-up required.
- It really was talking the talk versus walking the walk.

Starting Down a New Road



- I knew more than once a year was crucial.
- I originally started at every month and that was way to much.
- I then went to every other month and that was too much.
- Finally I went to quarterly and that has been perfect.



A Little History

- A have 16 people who report directly to me.
- 14 are Administrative and 2 classified.
- Our department is a result of combining the Registrar's Office, Bursar and Financial Aid.
- I was the former Bursar.
- We opened in 1995.

A Little History (continues)



- A big deal for me has always been professional development.
- Institution doesn't really support this as much as they should.



Quarterly Evaluations

1. At the quarterly evaluation I will sit down with everybody and we will review the self-tracking sheet which they have been working on for the last three months.
2. We will then determine which items belong on the Personal Development Plan form (the PDP). Not everything will go on the PDP.
3. After the evaluation is over (they typically last 30 to 45 minutes) I will send a follow-up report.



Forms

- Self-tracking
- Personal Development Plan
- Follow-Up
- Self-evaluation form
- Evaluation form



The Forms

- The PDP form is divided up into the following categories:
 - Training
 - Process Improvement
 - Projects
 - Personal Development
 - Miscellaneous
 - Contribution to Team



Follow-Up

- One of the big advantages in a quarterly system from my point of view is that it is easier to deal with issues (a/k/a performance problems).
- Say for example that I have someone who has have a number of customer complaints against them. I will discuss the problems as they happen but I will also discuss it during the quarterly evaluations.



Follow-up (continues)

- If the same issue appears more than once during the course of the year I put it into the annual evaluation.



The Process

- The first step in the procedure is to have everybody work on the Self-Tracking form.
- The first evaluation of the year is in April.
- They will bring the Self-Tracking with them and we will determine if, and where the items belong on the PDP form.



Process (Continues)

- At the end of the calendar year people will use the PDP form to help do their Self-Evaluations.
- In January we will then sit down and do the Annual Evaluation.



Examples of the Process

- Self-Tracking form. This helps people keep track of all the things they do.
- Items are transferred to the PDP form based on a consensus reached at the quarterly evaluations.



Major reasons why this works for me!

- Tactical vs. Strategical.
- It has been very important to show to those above me why I rate someone how I do.
- Merit part of the evaluation process.



Miscellaneous

- I have included a copy of the job description for the SSA (Student Services Administrator) because the merit component in the evaluation equation upper management wants to see justification from middle management why they rated someone as they did.



Conclusions

- My process certainly does require some time and effort on my part.
- However, it does seem to payoff.
- 70% of my department has now been with me for at least ten years.
- 35% have been with me since we opened Student Administrative Services in 1995.



Questions & Answers

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