

Staff Evaluations

Good for Everyone!



Why Conduct Staff Evaluations?

Evaluations can help create a better staff structure!

Evaluating how well someone does their job requires you to develop an idea of what they **should** be doing.

You may find that their job does not match your needs or expectations, and this gives you information to act on.

You may also find that your policies don't create the jobs you need, or that they don't support your staff in doing their jobs.

Why have Evaluations?

Why Conduct Staff Evaluations?

Evaluations set clear requirements on staff - what they can't do, what they must do.

Evaluations clearly document issues with staff so that you can act on them - give them a raise? A written warning? A change in job title? An evaluation helps you figure out the root of issues to create solutions.

You want to recognize and appreciate the work that staff do by providing them with an honest picture.

Evaluations and their reports leave a lasting record for members and staff to use when making plans.

Why Conduct Staff Evaluations?

In coops, there can be a communication gap between the daily work of members and the daily work of staff.

Staff want feedback, and often work without it. They chose to work for the coop, assume that they value the culture and unique nature of your coop!

Staff of coops often have too much to do, and could use help setting priorities. Tell them what could be better... but also what's going really well!

Staff can get caught up in their own work and perspective - it's very helpful for them to hear yours, and can help them build better relationships with members.

The Culture of Evaluations

What makes a positive or negative experience for members and staff

Positive Culture of Staff Evaluations

Evaluations happen regularly and are accepted by staff and members as normal

Data based! Balance subjective and measurable info to avoid bias.

Provides the staff person and the coop with information and ideas to improve.

This data is used to make decisions about staffing, budgeting, hiring, and job descriptions.

Evaluations and Social Justice

A conscious approach to avoiding bias in your staff

Positive Culture of Staff Evaluations

Mutually supporting and trusting - staff know what is expected and trust that their evaluation will be fair, and members know they will be heard.

Consistent evals are more objective. Don't "save up" complaints over a long time, bring them up openly with enough time to make real change possible.

Follow-up with staff on any issues that the evaluation brings up, and make clear plans for who will follow-up, when, and how.

Staff should feel that they have good opportunity to provide feedback about their colleagues, and also the structure of their job.

Evaluations for a More Just Workplace

Objective evaluations are a tool to challenge systems of power that perpetuate privilege and oppression in your coop.

There are systems of oppression in our society that show up in the workplace, usually without our noticing.

People can be isolated or scapegoated when problems come up. Be sure not to evaluate performance in isolation from other employees who also work in this area.

Peoples' salaries are tied to positive evaluations, so evaluations are a way to ensure that you aren't paying people differently based on biases.

Negative Culture of Staff Evaluations

Evaluations happen irregularly or in response to some specific situation.

The evaluation process is used as a threat ("Wait until your evaluation...")

No follow-up means that staff don't take the process seriously.

The format and type of survey tool used vary from year to year, which makes it hard to track longer-term trends.

Not all staff are evaluated in the same way, which can be seen as favoritism.

Sensitive information is not kept confidential or is used to retaliate.

Evaluations for a More Just Workplace

Tips for making your evals more objective:

- Look at the nature of the relationships the staff person builds with co-workers, members, and stakeholders
- Avoid an eval based around perfection - your staff will make mistakes, and room for improvement is a good thing
- Be sure to balance evaluation of the *quantity* of work with the *quality* of work
- Ask about potential conflicts - but remember that conflict may be a sign of progress or growth, and not just bad behavior.

Evaluations for a More Just Workplace

Tips for making your evals more objective:

- Rankings and ratings aren't necessarily objective
- It's tempting to use a uniform survey and say that it accurately reflects someone's work performance.
- Look at the full picture of what is happening in the organization.
- What challenges is the staff person facing in doing their job, either personally or organizationally?
- Who provided feedback through the evaluation process? Did they represent the co-op accurately?

Outline of an Evaluation Process

Determine a timeline for the evaluation process and inform the cooperative, including the staff person being evaluated.

Create or reaffirm the materials that you will be using. Using a consistent format from year to year helps everyone know what to expect and creates a system for measuring results.

Divide responsibilities for collecting data and writing a report.

Collect data from key stakeholders. You may want to ask other staff, members, officers, partners, vendors, and of course the staff person being evaluated.

Evaluations to Spot Power Dynamics

Ask questions about whether the staff shares information or holds that information close, as this can tell you about power dynamics.

Look for signs of unhealthy power dynamics through strong/emotional language in survey comments, and follow up with in depth conversations where possible.

Have evaluations in a regular scheduled way, and avoid evaluations as a reaction - this helps avoid using them as retaliation.

Try to evaluate all staff within a larger process, not just one person at a time, so see the context in which staff are performing.

Outline of an Evaluation Process

Analyze and filter the data into a useable form.

Create a report to share with the staff person that includes what they are doing well, and specific suggestions for improvement or growth. A staff person who is doing a great job might still benefit from new goals.

Go over the evaluation with the staff person. Present a written report with clear requirements and a timeline, and also go over the evaluation in person.

Follow-up on items that require it (such as goals or improvements) as agreed.

File evaluation in the staff person's file.

Outline of an Evaluation Process

Who should conduct the evaluation?

Co-op staff evaluations are generally done by a committee of the board, since the board has hiring/firing power.

One option is to create a standing Personnel Committee that does yearly staff evaluations as well as hiring new staff when needed or working through the termination process when there are major problems with staff. A Personnel Committee might also be involved in mediating grievances between staff members.

Another option is to create an ad hoc committee each year to conduct evaluations.

Who should conduct the evaluation?

In either situation, it's useful to have members of the board on the committee, and for the people on the committee to be familiar with staff job descriptions and how the cooperative functions.

Note:

Who conducts the evaluation is not the same as who gets to provide feedback about the person's performance. The committee should be people who can collect data and then analyze it and filter it into useful feedback. Lots of people, both inside and outside of the coop, should have the opportunity to provide feedback.

Evaluations Under Different Models

For co-ops that have an Executive Director (or General Manager, or General Administrator), the board may evaluate only that staff person. That "boss" position then evaluates the other co-op staff and reports the result to the board.

Having a fair, effective, and transparent process gives your ED a good starting point for evaluating the other staff.

For co-ops that have only one staff person or who don't have an ED/GM role, the board may be responsible for evaluating all of the staff people. In this case, consistency is especially important.

Types of Evaluation

Top down: The boss (in this case, the board), evaluates the staff person, with limited opportunity for input from others. This is often a quicker process, but the board or supervisor may miss perspectives on the total picture of the work.

More comprehensive: The people who someone supervises also get to evaluate them -- this is a particularly good option if the board supervises the ED/GM, and that person then supervises the rest of the co-op's staff.

Data-centric: Focus on presenting "the numbers", with little room for comments. This does lend itself to visually accessible graphs and charts, and more consistency than narrative-only approaches, but may be biased in the design of the questions.

Evaluation Best Practices

Types of Evaluation

Narrative: focused on telling a story about the person's performance and areas for improvement.

360 Evaluation: An evaluation that tries to collect feedback from as many sources as possible. This may mean many surveys have only a bit of info, but it also prevents bias in who is chosen to give feedback and gaps in the evaluation.

SELF EVALUATION: Part of any evaluation can be a self-evaluation. The staff person can evaluate their own work based on their job description, and even offer suggestions or goals for improvement.

Evaluation best practices

Should gather information from multiple angles - Other staff, board members, coop members, stakeholders, partners, and vendors whenever applicable

Based on the person's job description and your policies

Ends with a report making clear recommendations

Allows for anonymous responses, or to leave contact info for followup

Follow up on items that are concerning

Evaluation best practices

- Use easily measurable questions ("On a scale of 1-5" for example)
- Each question should have "I don't know" as an option
- Base the questions on specific duties assigned to the person
- Room for comments on each question
- Room for "anything else" comments on the eval in general
- Asks the respondent's relationship to the staff member (board? staff? member? stakeholder?)

Following up on an evaluation report

- Discuss the timeline in the evaluation report in board/committee meetings.
- Assign people to be responsible for following up (especially if you don't have a standing personnel committee who is responsible for this).
- Check in with the staff member to see if they have questions or a response to the evaluation, and help them make the improvements that are suggested. If the staff member has a response, it should be filed with their evaluation.
- Have a formal marker of when the requirements have been met.
- If serious issues were flagged for improvement, conduct a follow-up evaluation.

How not to Conduct Evaluations

- Don't assume problems - instead, think of evaluations as an opportunity to help someone improve their performance and thus benefit the co-op.
- Do not use an evaluation process to build a case for someone you want to fire. Evaluations need to be open and honest in intent to collect good data.
- If the staff person has done something serious enough to merit firing them, document it and act on it! In any other case, build your criticisms into a bigger picture plan for improvement.
- Don't conduct an evaluation because "you're supposed to". Have your board, staff, and members see how this is valuable information to help run the coop.

Examples of Evaluation Surveys

- A template for a staff evaluation survey is [available here](#).
- If your coop would like to use this template, please contact NASCO staff and an editable copy can be transferred to you for your customization.

Making a Good Evaluation Report

- There should be a report that is available to the general membership, although it may need to be redacted or more general for a wider audience.
- There should be a version available to your board or personnel committee with full details, and this same group should have access to the raw survey results.
- Reports should give the measured results of objective questions and also include highlights from the written comments where they illustrate a larger point.
- Needs to make clear recommendations with a timeline for follow-up and set any hard requirements in very clear terms.
- Should also point out areas where staff is doing well, to help them build on strengths.