

*Guidelines
for
Creating Annual Goals
and
Writing Annual Assessments
for District Staff Members
Effective 2-1-05*

Guidelines for creating annual goals and writing annual performance assessments were initially discussed by a taskforce consisting of district staff members and members of the District Presidents Association in 2004.

Members of the taskforce included Evelyn Spurgin (former DPA President and JPD Board President), Kathy Converse (former FL District President), Peter Morales (former Director for District Services), Tom Chulak (DE in St. Lawrence district), and Nada Velimirovic (former PC in PCD).

The guidelines also reflect additional ideas introduced by Harlan Limpert, Director for District Services.

They have been reviewed and approved by the District Presidents Association in November, 2004, and are supported by district staff members who provided suggestions at the Big Complex Meeting in December, 2004.

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BACKGROUND:

In the past, performance assessments of District Staff members occurred six-months after hire and at year three and year seven of their tenure. Some districts conducted assessments annually, though that was not the norm.

There is now agreement that ensuring *annual* assessments occur consistently is important. Here are some of the benefits of annual assessments:

- 1) They help district staff be more effective in their roles by providing helpful developmental feedback,
- 2) Increase job satisfaction by providing specific feedback on staff member contributions to the health and growth of their districts,
- 3) Create clear expectations for future efforts,
- 4) Clarify the role that the Director for District Services and the district board play in helping staff members meet those expectations for performance,

- 5) Ensure District Staff, district board members, & the Director for District Services are mutually involved in goal setting, and
- 6) Link these *annual assessments* with *progress towards goals*.

The process, as designed, also creates flexibility for the unique needs of each district.

PROCESS AND SUGGESTED TIME FRAMES

IMPORTANT NOTE - The month chosen is *completely up to the district board*, though the *sequence* of events below is suggested:

Step 1 (April):

- District reviews its vision, mission, and priorities
- UUA reviews its vision, mission, and priorities

Step 2 (May):

District Staff are asked to create a first draft of goals in line with the district *and* the UUA vision, mission, and priorities.

Step 3 (May & June):

The District President (DP) *or designate* and the Director for District Services (DDS) review the draft and make suggestions. Both the District Board and the DDS have a role in helping the staff person be successful, so the topic of how goals can be achieved is discussed. The staff person writes a final version of his or her goals, based feedback received from the DP and the DDS, and submits a copy to each for review and approval.

Step 4 (quarterly):

Each quarter the District Staff person creates a report describing his/her progress towards goals and identifying support needed from either the district board or the DDS to reach goals. The report is sent to both the DP & the DDS.

Step 5 (March):

Each year, the district staff person prepares a “self-assessment” of performance based on goals. This self-assessment is sent, typically by email, to the DP and the DDS for review.

Step 6 (March):

The DP & the DDS together review and discuss the self-assessment, typically by phone.

Feedback is solicited from those individuals and congregations with whom the District Staff person has worked in the prior year. This may be done through phone calls, written surveys, email solicitation of feedback, or from comments and suggestions made throughout the year. The DP and the DDS will coordinate the details of how this feedback is solicited and who is responsible to gathering the feedback. (Note: Feedback that is received during the year ought to be shared with the district staff person as it arrives, not held back until the annual performance assessment).

Step 7 (April):

The DDS writes a first draft of the Annual Assessment. The DP & the DDS discuss the draft and needed modifications. A final version is then written by the DDS.

Step 8 (April):

The DDS presents the assessment to the staff person, typically by phone. The DP will sometimes join the DDS and the district staff person on the phone.

Step 9 (May):

A draft of the next year's goals is created by the staff member in light of what has been learned.

The key in creating goals is that they:

- be tied to district & UUA vision and mission
- create clear expectations
- involve the staff person, the district board, and the DDS
- include measurable results
- are realistic and attainable

Over time the process will be fined-tuned so that maximum benefit is achieved.