

## FY19 INTERIM PERFORMANCE FEEDBACK GRADES 7 – 33 DIRECTIONS

### **I. DIRECTIONS:**

**The Performance Evaluation Program will be redesigned to be a Performance Feedback System in FY19 to assist managers and employees** in improving both individual and organizational performance. The goal of the new performance feedback system is to support Lesley's High Performance Culture by encouraging more frequent feedback between the manager or supervisor and the employee. This approach is more focused on discussing progress and impediments to achieving goals, and improving work depending on the circumstances as well as discussing and identifying opportunities for personal development and growth. Over the next year, we will develop a process and template that supports defining, assessing and coaching staff around these conversations and developmental goals. We anticipate full implementation beginning in FY '19.

FY19 will be a transition year, our intent is to increase feedback and continue to use the existing forms with slight revisions to record the feedback at each quarter, mid-year, and year-end session. The revised forms will no longer use a numerical rating; but rather a check box to mark for each quarter-end, mid-year and year-end performance discussion, with a three rating code (see page 7 for more detail) to apply during the year-end performance assessment. The revised expanded forms provide more space to encourage feedback and written commentary.

One of the overarching special goals for the University for FY19 is:

1. To build a high-performance culture – especially by beginning to enact the specific behaviors listed below:

- Engage in conversation and problem-solving (how we can best serve our students – seek direct feedback from students);
- Make decisions and develop new solutions in a collaborative, disciplined, inclusive manner, and encourage deep commitment to personal accountability;
- Develop upfront clarity around decision-making roles and responsibilities, with the goal of achieving alignment and support to reach consensus (documented procedure that outlines the decision making process);
- Seek to understand differences and actively work to resolve conflict by exploring interests and brainstorm new possible solutions (deep listening, constructively and respectfully challenging each other's ideas, as part of the path to joint learning and creative problem solving);
- Provide as much emphasis to determining what to stop doing because it no longer serves us well, as determining new things to do
- Celebrate our successes and lessons learned;
- Assess investment proposals and decisions based on external and internal analysis, evaluated based on agreed upon criteria and tracked against defined metrics;
- Share performance feedback with one another, and solicit feedback from others directly and regularly;
- Encourage regular communication about decisions made, new plans, progress, challenges, etc. and provide transparency around decisions made and the criteria or reasoning on which they are based.

Performance Management **begins with an accurate and detailed job description**. Both the manager and employee should review the essential functions of the employee's job description to ensure it is current and accurately reflects what the employee actually does. Job descriptions should reflect work being done. As some employees have acquired new responsibilities, it is important that all the work is achievable during a 35hour workweek. Some tasks may need to be eliminated. If in reviewing the job description, it needs to be revised please contact Human Resources to make appropriate changes. From that job description, the manager and employee can determine **three to five most significant essential**

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**functions** of the position and from these functions **establish performance goals and objectives**. These goals should be substantive, aimed at what the employee should accomplish over the year; with one goal focused on employee professional development (directly supporting the employee’s self-improvement, doing better/getting better at doing something over the performance year, including coaching). The goals should also incorporate the special goal to build the high performance culture at Lesley detailed above. For FY19, two interim revised performance feedback forms, for administrative employees, grades 7 through 24 and for administrative professionals, supervisors and managers grades 25 through 33, may be downloaded from the HR website under HR Forms/Performance Feedback Forms.

The manager **selects only those PERSONAL COMPETENCIES appropriate to the position**. *Personal Competencies* are those **qualities – the ‘way’ or ‘how’ a person does on the job that differentiates between successful and unsuccessful performance**. *COMPETENCY DEFINED (found at the end of this document)* show each competency (for competencies found on both Performance Feedback Forms), in alpha order, with examples of behavior.

Using the employee goals and competencies, managers and supervisors need to **develop professional development strategies** to assist employees in achieving their goals. These strategies might consist of a specific training, seminars or course work to assist them in having a successful work outcome or participating on a team or University committee which develops new skills in understanding the University’s needs . The employee’s professional development may also be focused on competencies, for example, providing training and skills to someone who gets the job done but is not good at sharing information.

The manager/supervisor **shares the proposed goal setting plan and/or rating with the Reviewing Manager/Department Head prior to meeting with the employee at the beginning of each FY** to discuss the planning and goal setting, **at mid-year to discuss progress** and **at year-end** to discuss the final assessment and to obtain feedback on the employee’s performance.

**Goal Setting, Quarterly Check-Ins, Mid-Year, and Year-End Performance Feedback Sessions**

<b>Meeting</b>	<b>Objective</b>	<b>Date</b>	<b>Note</b>
<b>Planning and Goal Setting</b>	<b>Development of Goals and Objectives</b>	<b>July – September</b>	<b>Prior to meeting, meet with Reviewing Manager/Department Head</b>
<b>QE 1<sup>st</sup> Feedback Session</b>	<b>Review goals progress and provide feedback on progress–</b>	<b>September/October</b>	
<b>QE 2<sup>nd</sup> Mid-Year Progress Assessment</b>	<b>Review goals progress and provide feedback on progress</b>	<b>December/January</b>	<b>Prior to meeting, meet with Reviewing Manager/Department Head</b>
<b>QE 3<sup>rd</sup> Feedback Session</b>	<b>Review goals progress and provide feedback on progress–</b>	<b>March/April</b>	
<b>Year End (YE) Assessment</b>	<b>Meet to discuss YE review, ,</b>	<b>June</b>	<b>Prior to meeting, meet with</b>

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	and create action plan for next cycle,	To HR by August 1 <sup>st</sup> each FY	Reviewing Manager/Department Head
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**How to Prepare for Performance Feedback Session and Assessment:**

An effective appraisal session is one that is open and collaborative. This may best be achieved through the implementation of the five-step COACHING format:

1. Create a positive climate that ensures communication and transparencies on what the goals will be and what the expectations are for this employee. Ensure that s/he/they understands what is expected and why, and what measurable tools you will use to determine the success of each goal. It is also important to describe why these goals have been determined, and how the goals support the overall office goals (for offices that have annual goals, the individual's work should be related)
2. Have the employee discuss the perception of the position and allow her/him/they the opportunity to discuss what and how s/he/they will meet the expectations of the position. S/He/They should be able to articulate what it is you are asking of her/him/they and the manner by which s/he/they will be evaluated.
3. Add your perspective of her/him/their position and how the position relates to the strategic goal(s). It is imperative that you clearly articulate the expectation and the measurements you will employ during the evaluative period. As the immediate manager/supervisor, you are charged with motivating employees to achieve the goals and informing her/him/they of the behavioral expectations you expect her/him/they to demonstrate throughout the year.
4. Clarify and resolve any differences and/or disagreements you may have with one another, or write different reactions or expectations.
5. Help develop a collaborative set of goals that are attainable and measureable.

FEEDBACK – Throughout the year, at each quarter, mid-year and year-end, there are opportunities to provide feedback on progress of goals and status of competencies

**All goals should meet the criteria of “SMART” goals:**

- ✓ **Specific**
- ✓ **Measurable**
- ✓ **Achievable**
- ✓ **Relevant**
- ✓ **Time-framed**

**High Impact Goals:**

Goals are defined as a primary function derived from the position description. Goals may be the same from one year to another based on the complexity of one's job function, office or University goals. However frequently, supervisor/manager's annual goal setting changes year-to-year in some aspect based on the University plans or needs. Goal setting may have little effect if individuals cannot see the state of their performance in relation to the goal. It is important that employees know where they stand in relation to achieving their goals, so they can determine the desirability of working harder or of changing their methods.

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Goal setting is a process, and like any other process, there are a series of specific steps and tools that must be followed and used to execute it correctly.

Setting goals affects outcomes in four ways:

1. Goals focus attention toward goal-relevant activities and away from goal-irrelevant activities.
2. Goals serve as an energizer; they can lead to more effort in achieving a better outcome.
3. Goals affect persistence.
4. Goals can lead individuals to develop and change behavior - Cognition.

Managers may not be able to constantly drive motivation or keep track of an employee's work on a continuous basis. Goals are therefore an important tool for managers and encourage employees to be more self-reliant in regards to attain certain outcomes. Through an understanding of the goal-setting outcome on individual performance, organizations are able to use goal setting to strengthen or benefit organizational performance.

The expected outcomes of goals are positively influenced when employees are involved in the goal setting process. Not only does participation increase commitment in attaining the goals that are set, participation influences self-efficiency as well. In addition to this feedback, it is necessary to measure one's progress. When this is left aside, an employee might think s/he/they is not making enough progress. This can reduce selfefficiency and thereby harm the performance outcomes in the long run.

The enhancement of performance through goals requires feedback. Goal setting and feedback go hand-in-hand. Without feedback, goal setting is unlikely to be effective. Providing continuous feedback on short-term objectives helps to sustain motivation and commitment to a goal. Feedback can also be provided on the strategies followed to achieve the goals and the outcomes. Proper feedback is critical, and managers and supervisors need to be mindful that they are responsible for providing employees:

- Information on how successful they have been in attaining the goals. Without continuous feedback channels it is impossible to adapt or adjust to the required behavior to successfully achieve the goals by year's end.
- Motivation that will stimulate and engage employees to accept goals. If employees lack commitment to goals, they lack motivation to reach them. To commit to a goal, one must believe in its importance or significance.

On a quarterly basis, at mid-year and at year-end, managers and employees will meet to discuss individual progress

### **How to write effective and measurable goals:**

A Performance Goal is a written statement of what you expect to accomplish – the results of one's activities within a given time period. The goal should represent something substantive that an employee aims to accomplish over the year, with one goal focused on the employee's professional development.

All goals should follow the following formula:

***Action Verb + Single Key Result (object of the action that is verifiable and measureable) + Measured Method, by target date.***

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Use as many measurement methods (quality, quantity, cost, timelines) as possible

### Examples:

1. Increase student retention by 10% over the prior fiscal year.
2. Increase undergraduate enrollment by 5%.
3. Reduce by 10% the energy usage in Sherrill Hall by 6/30/18.
4. Develop and pilot new performance feedback system for final implementation by July 1, 2018.
5. Participate in three management-training activities during FY19.

### Well-defined goals should be:

- Innovative: Implementation of new services/processes.
- Problem Solving or Improvement: Bringing productivity or quality to a higher standard.
- Maintenance or Basic Job Responsibilities: Upkeep/maintenance of current job responsibilities with desired results.
- Developmental: Learning a new task or developing a new skill.

### You should be able to answer the following questions about the goals:

- How will I know I achieved the goal?
- How will I determine the progress?
- What can be measured?
  1. Quantity
  2. Quality
  3. Cost
- Is the goal in alignment with the mission of the department, unit, or team?
- Does the goal relate to broader objectives that Lesley wishes to achieve?
- Does the goal improve the product or service you provide?

Without establishing clear, well defined, and measurable goals, your employee(s) may be at a disadvantage in knowing how well s/he/they has accomplished the goal(s).

### **Planning and Goals Setting:**

Meet to **establish performance goals and objectives for the new year**, the overall goal is to **establish a dialogue with employees regarding your and their expectations** in their respective roles for the new fiscal year. This is particularly true if employee has been in the job for a while –

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expectations may change with experience. The goals should **reflect the primary functions of the position** and as mentioned above need to meet the criteria of “**SMART**” goals. It is essential that your **employee has a full understanding of the expectations** and should be encouraged to ask questions, if appropriate. **All goals should be discussed with your reviewing manager/department head in advance of your discussion with your employee. It is also important to identify any training that the employee should consider to improve her/his/their skills. Assist the employee in identifying a coach or mentor, if appropriate.**

### **Quarter-End (QE) 1<sup>st</sup>, 2<sup>nd</sup> (Mid-Year), 3<sup>rd</sup>, Feedback Sessions:**

As managers and supervisors, you will be required to conduct a minimum of three quarter-end check-in (including a mid-year) to provide feedback on the progress of meeting the goals (use the form to write and record the feedback). In the event of changes to any goal(s) due to operational needs, the administrator and staff should be notified in advance. These quarter-end and mid-year **check-ins are an opportunity to discuss the employee of her/his/their progress in achieving the goal, to obtain information from the employee about their own sense of progress, and any needs they might have associated with achieving the goals. Supervisors and managers would meet with their respective reviewing managers to discuss the mid-year performance progress feedback prior to meeting with the employee.** In the event that your employee is **not meeting the expectation of the goal (is not achieving the goal or needs improvement), you should discuss what is hindering success, identify roadblocks and collaboratively try to creatively problem solve, and you should be in contact with Jane Joyce, Director of Human Resources, at extension 8785.**

### **Year-End (YE) Assessment:**

The Year-End **assessment will reflect an assessment of the employee’s overall job performance** from 7/1 through 6/30 each fiscal year. You will be expected to complete this assessment and submit the original form to Human Resources by August 1. To ensure that the process is consistent and reflective of the employee’s contributions, **supervisors and managers will be required to meet with their respective reviewing managers to discuss the entire fiscal year performance prior to meeting with the employee.** Once that is completed, you should **schedule a meeting with your employee to discuss the final assessment of her/his/their job performance.**

In the event that **your staff member is not in agreement with her/his/their overall / assessment, s/he/they may refuse to sign the form.** Should that occur **do not force the issue, their signature only indicates that s/he/they has discussed and seen the assessment.** If the employee declines to sign, you should sign the form and indicate that the employee has seen the document and has chosen not to sign. Forward the assessment to Human Resources Director, Jane Joyce for follow-up guidance.

The **employee may also want to submit a response to the Year-End assessment, should s/he/they elect to; s/he/they may do so. Her/his/their response should be sent directly to Human Resources and will be attached to the original assessment.** However, if you and the employee have been having good feedback discussions throughout the year it is unlikely this will occur. **The employee should be encouraged to send a copy of the response to the manager/supervisor.**

### **Appeal Process:**

If the employee does not agree with the overall performance feedback assessment, s/he/they may request a meeting with Human Resources to discuss the performance feedback by sending a request to the office of Human Resources attention: Susan Titus Garnier.

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**HR REVIEW:**

HR Office will review the performance assessments to ensure the process has been followed and there is consistency. If you would like information and/or feedback on how to write your smart goals or the performance feedback process contact HR for assistance.

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**PERFORMANCE GOALS**

This section is used to examine how the employee achieves her/his/their end-results. Consider the degree to which each of the following competencies contributes to the employee's effectiveness.

**Ratings Codes:**

- (AG)**      **Achieved Goals/on target to meet goals:** Performance achieves met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.
- (NI)Level 2**      **Needs Improvement/not on target to meet goals\*:** Performance did not meet or is not on target to meet expectations in one or more of the most critical goals, and/or one or more of the personal competencies were not met. As part of the assessment, please use Section IV to outline what actions or professional development strategies should be undertaken to assist employee in meeting goals. Include a description on how the employee must improve in order to achieve goals, individual timelines, actions, etc. Manager is encouraged to contact HR. If it is the first year of low rating, Manager is required to contact HR if s/he/they plans to award this rating.
- (DNAG)Level 1**      **Did Not Achieve Goals:** Performance did not achieve or was consistently below expectations in most essential areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. In Section IV, a plan to correct performance, including timelines, is outlined and monitored to measure progress. Manager is required to contact HR if he/she/they plans to award this rating.

**\*Do not use the NI rating code if an employee is not on target to meet goals due to a change in business priorities of the University/School/Division/Department/Office, not due to their own need for improvement or inability to achieve the goal. Add content that explains the reason and do not rate the goal.**

**COMPETENCY DEFINED**

The manager **selects only those PERSONAL COMPETENCIES appropriate to the position.** *Personal Competencies* are those **qualities – the ‘way’ or ‘how’ a person does on the job that differentiates between successful and unsuccessful performance.** *COMPETENCY DEFINED* show each competency listed with examples of behavior (Competencies are listed in alpha order, not in priority order). Select the appropriate behavior from the examples listed compared to the actual behavior exhibited.

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<p><b>ADAPTABILITY:</b> Considers the degree to which employee adapts to change and is able to adjust strategy in response to new information; responds appropriately without having all parameters defined and seeks innovative and creative solutions to new or changing situations. Takes professional risks and challenges self or others not to accept the status quo. Ability to prioritize and/or adjust work assignments to meet changing organizational goals.</p>		
<p><b>Achieves</b></p> <p><i>Employee adapts quickly and easily to changing circumstances/environment; demonstrates comfort with and tolerance for ambiguity; modifies approach quickly as new information is discovered; faces uncertainty or challenges positively with composure; not easily frustrated or flustered; approaches problems creatively, takes reasonable risks; proceeds appropriately with little supervision.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee exhibits limited adaptability to changing circumstances or environment; has minimal tolerance for change and ambiguity; when directed, employee modifies approach as new information is discovered; occasionally becomes frustrated/flustered; rarely offers creative solutions; proceeds with projects and tasks only with supervision.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not adapt to changing circumstances or environment; appears uncomfortable with or intolerant of ambiguity; does not modify approach as new information is discovered; is easily frustrated/flustered; does not generate creative solutions or take risks, requires constant supervision.</i></p>
<p><b>ANALYTICAL SKILLS:</b> Considers the degree to which the employee reasons, thinks, and interprets issues in a manner to support sound conclusions, conducts thorough research and presents sound alternatives based on key facts. Is able to use basic analytical tools.</p>		
<p><b>Achieves</b></p> <p><i>Clearly think things through in order to come up with sound conclusions; conducts thorough research and basic analytical tools.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee could use some improvement in interpreting issues to support sound conclusions, and the use of basic analytical tools.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee is unable to interpret issues to support sound conclusions, and does not have an understanding or knowledge of the use of basic analytical tools.</i></p>
<p><b>CUSTOMER FOCUS AND QUALITY OF SERVICE:</b> Considers the needs of internal and/or external students/faculty/employees/vendors/alumni/parents, etc. when making decisions or designing programs and responds in a timely, courteous, respectful and responsive manner. Demonstrates a commitment to deliver professional services according to Lesley's standards and determines appropriate steps or courses of action to problem solve issues raised. Serves our students by seeking direct feedback from students.</p>		
<p><b>Achieves</b></p> <p><i>Employee considers students/faculty/employees/ vendors/alumni/parents, etc., needs and responds to problem/request with appropriate sense of urgency; seeks direct feedback from students, keeps others informed of potential high impact problems; maintains a calm/reasonable tone when dealing with students/faculty/employees/ vendors/alumni/parents, etc.; consistently returns calls/follows up in a respectful and timely manner.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee sometimes shows a sense of urgency in responding to students/faculty/employees/ vendors/alumni/parents, etc.; does not solicit or seek student feedback, occasionally researches difficult problems when directed to do so; is sometimes unprofessional or disrespectful toward others; does not return calls or /follow up on a timely basis.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not show a sense of urgency in responding to students/faculty/employees/ vendors/alumni/parents, etc.; does not seek student feedback, avoids researching difficult problems; is often unprofessional or disrespectful toward others; does not return calls/follow up on a timely basis.</i></p>
<p><b>DECISION MAKING:</b> (if appropriate) Considers the degree to which employee makes sound decisions and solves problems; obtains and evaluates relevant information of</p>		
<p>best practices and seeks advice of others as appropriate and communicates decisions in clear, timely manner to all impacted.</p>		

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<p><b>Achieves</b></p> <p><i>Employee researches and consults with other to obtain all the facts for problem resolution; is adept at identifying the root cause of ongoing problems and determining the appropriate procedural changes; regularly looks for ways to improve processes and implement solutions; recognizes the importance for prompt and timely decisions and actions; superior judgment in pursuing solutions</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee sometimes acts without gathering/checking facts or only when directed to do so; sometimes uses systematic approach to problem solving; generates impractical solutions; occasionally exercises sound judgment in making final decisions.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee often acts on problems without gathering/checking facts or only acts on problems when directed to do so; does not apply knowledge from similar problems in the past; does not have a systematic approach to problem-solving; does not exercise sound judgment in making final decisions.</i></p>
<p><b>DELEGATION:</b> (if appropriate) Considers the degree to which the employee effectively assigns responsibility, resources, and authority to achieve results; develops measurable goals and holds people accountable for the results.</p>		
<p><b>Achieves</b></p> <p><i>Employee clearly and effectively delegates both routine and important tasks and decisions; develops measurable goals and accountability, provides the necessary instruction in order for an employee to complete tasks and goals; makes the necessary resources available for employee to complete task and goals successfully and within budget constraints; proactively shares both responsibility and authority; successfully coaches staff on ways to improve their skills and abilities; acts as a mentor for staff.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee occasionally delegates tasks that s/he/they should complete personally or does not delegate at all; sometimes develops measurable goals, sometimes delegates responsibility but keeps authority needed to complete tasks; sometimes delegates tasks, but may not monitor progress.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee consistently delegates tasks that s/he/they should complete personally or does not delegate at all; does not develop measurable goals, delegates responsibility without delegating the authority needed to complete the task; delegates tasks but does not monitor progress.</i></p>
<p><b>DEPENDABILITY, RELIABILITY AND ATTENDANCE:</b> Considers the employee's ability to meet deadlines; and degree and accuracy by which the employee completes work assignments including appropriate reports and records and being at work consistently on time. Employee demonstrates dependability on the job and is responsive to the needs of the school/department and University.</p>		
<p><b>Achieves</b></p> <p><i>Employee's reports and records are generally on time, up to date and complete. Accepts accountability. Assignments are completed in a thorough manner. Employee is consistently on time for work; keeps manager informed of whereabouts as needed; maintains expected hours.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee could use some improvement in making sure reports are turned in on time and complete. Employee is late for work or leaves early without explanation; is sometimes away from worksite; takes longer lunches, breaks.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee is late turning in reports. Inadequate and incomplete reports and records. Employee is consistently late for work, leaves early, is often away from worksite without explanation; often takes longer lunches, breaks.</i></p>
<p><b>DIVERSITY AND INCLUSION:</b> (Mandatory) Considers the degree to which behaviors support Lesley's commitment to strengthening its diversity and inclusion goals. Demonstrates behaviors that include fairness, respect, inclusiveness, empathy, integrity and ethical conduct. Fosters a climate and culture in which each person is accepted and has the opportunity to grow and develop. Practices behaviors that promote diversity and inclusion in dealings with and on behalf of the University. Respects and supports the diverse needs of all members of Lesley University.</p>		

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<p><b>Achieves</b></p> <p><i>Employee recognizes and respects differences. Seeks and utilizes feedback from diverse sources. Actively recruits and promotes members of groups that have been historically denied access and opportunity. Members across all identify groups are full participants in decisions</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee is often not aware of or interested in diverse backgrounds or points of view. Employees are not always respectful or willing to reach out to others. Is reticent to include new people or ideas. Needs to develop stronger understanding and awareness of opportunities to support and</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not demonstrate inclusiveness; fails to recognize the value of differences. Is not welcoming or respectful; coworkers and campus partners often 'work around' to avoid interaction. Neither understands nor promotes opportunities to experience diversity on campus.</i></p>
<p><i>that shape the University inclusion of diverse cultures, lifestyles, and interest.</i></p>	<p><i>experience diversity on campus.</i></p>	
<p><b>FINANCIAL MANAGEMENT AND REPORTING:</b> (if appropriate) Considers the degree to which the employee uses appropriate resources to get results and makes sound financial decisions based upon departments/ branches budgetary parameters. Displays a broad understanding of business practices, policies and trends.</p>		
<p><b>Achieves</b></p> <p><i>Employee consistently uses resources efficiently; considers cost effectiveness, competitiveness and profitability measures in business practices and policies; Has a broad knowledge of financial management and reporting practices strategies, analysis, problems solving, and applies own expertise.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee occasionally seeks or uses resources efficiently; seldom considers cost effectiveness, competitiveness and profitability in business practices and policies.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not seek or use available resources efficiently; does not consider cost effectiveness, competitiveness and profitability in business practices and policies.</i></p>
<p><b>GOAL SETTING, PLANNING AND ORGANIZING:</b> Considers the ability of the manager to gather and analyze relevant data to determine unit's organizational goals and to organize work assignments to meet operational needs within the scope of authority; to create and follow action plans; proactively communicate project status and/or issues.</p>		
<p><b>Achieves</b></p> <p><i>Employee establishes highly effective, measurable, and realistic performance goals/objectives tied to University, individual, and team/department goals; accurately scopes out length and difficulty of tasks and projects; develops action plans consistent with performance goals and objectives for projects; participates in plan development; provides direction and input to team/department and applies planning acumen to objectives</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee seldom sets performance goals or sets vague goals lacking specific measurement criteria; inconsistently ties individual to team goals; sometimes over/under estimates the length or difficulty of tasks and projects; occasionally measures performance with criteria/ goals; some- times does not plan for contingencies; provides inadequate task direction or advance notice to others.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not set goals or sets vague goals lacking specific measurement criteria; does not tie individual goals to team goals; often over or under estimates the length and difficulty of tasks and projects; does not break down work into process steps; rarely measures performance against objective criteria/ goals; does not plan for contingencies; does not appropriately involve others.</i></p>
<p><b>INTERPERSONAL AND COMMUNICATION SKILLS:</b> Considers the degree to which employee comprehends others and expresses and presents ideas appropriately and clearly. Considers the organization, clarity and conciseness of both the written and verbal communication. Upholds and incorporates global values appropriately when communicating in written and verbal formats. Uses active listening skills to improve relationships and services to internal/external customers. Gives and receives feedback that is supportive and encourages successful communications. Is able to participate in difficult discussions and reach compromise and/or consensus.</p>		

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<p><b>Achieves</b></p> <p><i>Employee consistently and actively listens when receiving direction or interacting with other team members; focuses on discussion at hand; asks questions relevant to problem under discussion, verbal and or written communication are accurate and professional. Is able to give and receive feedback that is supportive and encouraging. Is able to have difficult discussions and reach compromise and/or consensus.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee interrupts when receiving direction or interacting with other team members; sometime continues to do other work when a problem is being discussed; occasionally asks questions that are not relevant to the discussion or are redundant; verbal and/or written communications sometimes require correction or clarification. Has difficulty receiving and giving feedback that is supportive and encouraging. Has difficulty participate in difficult discussions and unable to reach compromise and/or consensus.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee consistently interrupts when receiving direction or interacting with other team members; repeatedly asks same questions about a topic or asks questions that are irrelevant to the discussion; continues to do other work when a problem is discussed; verbal and/or written communications require rework or are difficult to understand. Is unable to received or give feedback that is supportive and encouraging. Is unable to participate in difficult discussions.</i></p>
<p><b>LEADERSHIP:</b> Considers the degree to which employee effectively motivates and recognizes everyone’s contribution to ensure Lesley’s success. Is a strategic thinker who consistently strives for improvement and change through thorough research, assessment and analysis. Leads by example by establishing trust, respect and provides guidance to others, colleagues, customers and the community to reach their goals. Assists and guides appropriately and respectfully by addressing performance issues. Extent to which an employee creates and enhances a diverse environment; extent to which the employee encourages openness toward all people through engaging in the</p>		
<p>diversity of ideas and respect for difference.</p>		
<p><b>Achieves</b></p> <p><i>Employee consistently assesses each team members’ strengths and developmental needs; develops a plan to meet each individual’s needs; is able to lead by example and is successful in motivating team members; consistently communicates in open/honest manner; recognizes and appropriately addresses good and poor performance. Assesses and strategically strives to resolve problems and identify ways to make improvements that positively affect change and growth at the University.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee occasionally recognizes differences in individual motivational needs or makes an effort to do so; motivates team members who are like themselves; sometimes holds back information from team; irregularly communicates information; sometimes recognizes good performance; sometimes addresses poor performance. Is unable to think strategically and problem solve</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee fails to recognize differences in individual motivational needs or makes no effort to do so; can motivate only team members who are like themselves; often holds back information from team; communicates information sporadically; does not recognize/reinforce good performance; does not address poor performance in timely manner at all. Has difficulty thinking strategically and solving problems.</i></p>
<p><b>ORGANIZING AND INITIATIVE:</b> Considers the degree to which the employee plans, prioritizes, and achieves his/her/their goals. Has the ability to keep work organized allows workers to focus on different projects without getting disoriented or lost, thereby increasing productivity and efficiency in the workplace. Employee accurately researches assignments to understand and communicate goals; creates and follows action plans; and interprets issues in a manner to support sound conclusions, conducts thorough research and presents sound alternatives based on key facts. Considers the degree to which the employee approaches issues and problems with ingenuity. Displays energy and enthusiasm in completing tasks. Seeks out new responsibilities and acts on opportunities. Generates new ideas and follow through on a plan of action.</p>		
<p><b>Achieves</b></p> <p><i>Employee is a high achiever. Ensures that one’s own and others’ work and information are complete and accurate; carefully prepares for meetings and presentations; follows up with others to ensure that agreements and commitments have been fulfilled. Strives for leadership roles. Highly alert, innovative, creative and constructive.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee needs some prodding to do work. Dislikes responsibilities. Does not consistently ensure that his/her/their own and others’ work and information is complete and accurate, carefully prepare for meetings and presentations, or follow up with others to ensure that agreements and commitments have been fulfilled. Has very little drive. Believes in just getting by.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee never volunteers to undertake work. Does not ensure that his/her/their own and others’ work and information is complete and accurate, carefully prepare for meetings and presentations; or follow up with others to ensure that agreements and commitments have been fulfilled. Requires constant prodding to do work. Has no drive or ambition.</i></p>

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<p><b>PRODUCTIVITY AND QUALITY OF WORK:</b> Considers employee’s volume of work given time expectations and available resources and the degree to which employee completes his/her/their job responsibilities in an organized, accurate and thorough manner.</p>		
<p><b>Achieves</b></p> <p><i>Employee completes work within timeframes and keeps pace with overall demands of the job; plans and schedules daily activities to meet task/project commitments, focuses on priorities. Employee seeks guidance and assistance when demands exceed time. Employee consistently produces quality work; obtains and delivers information to customers and teammates in effective and professional manner; reviews work before distributing; maintains organized worksite and method of ensuring work is completed in a timely manner.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee has some trouble completing work within timeframes and/or occasionally keeps pace with overall demands of the job; occasionally plans and schedules daily activities to meet task/project commitments. Employee’s work sometimes contains errors and often requires rework or revision; information gathering or delivery is occasionally incomplete; employee demonstrates initiative in trying to organize him/her/their self, workload or worksite but is inconsistent; requires additional follow-up by team or manager.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee seldom completes work within timeframes and rarely keeps pace with overall demands of the job; does not plan or schedule daily activities to meet task/project commitments. Employee’s work often contains errors, requires rework or revisions; information gathering or delivery is often incomplete; employee’s worksite is cluttered, teammates are unable to locate needed items quickly; employee lacks ability to followthrough on tasks without requiring continual follow-up by team or manager.</i></p>
<p><b>STAFF DEVELOPMENT:</b> (if appropriate) Considers how the employee manages a diverse group of employees equitably, and effectively assists each staff member in developing his/her/their knowledge, skills and abilities through planning, work experience, coaching and training.</p>		

<p><b>Achieves</b></p> <p><i>Employee establishes appropriate goals and performance standards for each employee; provides direction; delegates responsibilities as appropriate; sets expectations and monitors delegated activities; provides recognition and feedback to employees; develops subordinates’ skills and encourages growth.</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee performs limited assessment of team member’s skills, knowledge and abilities; identifies and provides feedback on strengths and areas for improvement only when required; occasionally provide challenging and stretching tasks and assignments; sometimes holds development discussions; may know some team member’s career goals; constructs and executes development plans when required.</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee does not assess team member’s skills, knowledge and abilities; does not identify and provide feedback on strengths and areas for improvement; limits employees to routine tasks/assignments; micromanages employees, rarely holds development discussions; creates hurried development plans, if any.</i></p>
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<p><b>TEAM EFFORT:</b> Ability to work collaboratively with other employees in the department and throughout the University, consider willingness to assist others and ability to take into account other’s point of view. Employee contributes to ensuring fair and equitable work environment and encourages respect for all people and points of view</p>		
<p><b>Achieves</b></p> <p><i>Employee establishes and maintains highly effective interpersonal/team relationships with team members throughout the University; interacts collaboratively with others in an open, honest and non-threatening manner; is highly effective in handling opposition and conflict constructively; is fair and equitable and respects all people and points of view, exhibits strong leadership skills. Adjusts and where necessary redirects work plans to anticipate changing needs; superior ability to manage multiple tasks, deadlines and uncertainty</i></p>	<p><b>Needs Improvement</b></p> <p><i>Employee occasionally interacts with others in a manner that causes friction and impairs communication; sometimes pursues own priorities at the expense of team objectives; recognizes importance of teamwork but views individual differences as obstacles; occasionally exhibits communication that does not ensure that the work environment is fair and equitable and respects all people and points of view, shares information and contributes when directed to do so; occasionally exhibits unprofessional communication to others</i></p>	<p><b>Did Not Achieve</b></p> <p><i>Employee interacts with others in a manner that causes friction and impairs communication; often pursues own priorities at the expense of team objectives; reluctant to share information or contribute when needed; does not recognize the importance of teamwork; inflexible in approach; often exhibits unprofessional communication or behaviors to others; exhibits communication that does not ensure that the work environment is fair and equitable and respects all people and points of view displays resistance to constructive feedback and fails to acknowledge areas for growth and development.</i></p>