

**FY18 INTERIM PERFORMANCE FEEDBACK FORM
FOR ADMINISTRATIVE STAFF (Grades 25 - 34)
DISCUSSION AND REVIEW**

Employee: _____ Job Title: _____

Department: _____ Reviewer/Supervisor: _____

Performance Feedback Period: July 2017 – June 2018

I. OVERALL PERFORMANCE FOR THE YEAR: Describe overall performance including goals that were achieved and how results were achieved. (e.g., through leadership, teamwork). Describe actions and progress made. Identify areas for improvement and professional development that will be accomplished to support the improvement.

Supervisor/Manager Comments:

Employee – Self Evaluation:

II. PERFORMANCE GOALS AND OBJECTIVES: Identify 3 - 5 goals based on the ESSENTIAL FUNCTIONS or primary responsibilities of employee's job description or special projects if significant. If in reviewing the job description, it needs to be revised please contact Human Resources to make appropriate changes. See

instructions for assistance forming “SMART” goals. Provide comments and work related evidence supporting the employee’s achievement of the goals on going in Q1, Mid-Y, Q3, and YE.

Rating Codes:

Rating	Abbreviation
Achieved Goals/on target to meet goals	AG
*Needs Improvement/not on target to meet goals	NI
Did Not Achieve Goals	DNAG

*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.

(Performance Goal#1)		Objectives/Comments: Supervisor/Manager Comments: Employee – Self Evaluation:
Rating:		
Goal Planning	Date:	
Q1	Date:	
Mid-Y	Date:	
Q3	Date:	
YE	Date:	

(Performance Goal#2)		Objectives/Comments: Supervisor/Manager Comments: Employee – Self Evaluation:
Rating:		
Goal Planning	Date:	
Q1	Date:	
Mid-Y	Date:	
Q3	Date:	
YE	Date:	

(Performance Goal#3)		Objectives/Comments: Supervisor/Manager Comments: Employee – Self Evaluation:
Rating:		
	Goal Planning Date: 	
	Q1 Date: 	
	Mid-Y Date: 	
	Q3 Date: 	
	YE Date: 	

(Performance Goal#4)		Objectives/Comments: Supervisor/Manager Comments: Employee – Self Evaluation:
Rating:		
	Goal Planning Date: 	
	Q1 Date: 	
	Mid-Y Date: 	
	Q3 Date: 	
	YE Date: 	

(Performance Goal#5)		Objectives/Comments: Supervisor/Manager Comments:
Rating:		
	Goal Planning Date: 	
	Q1 Date: 	

Mid-Y	Date:	Employee – Self Evaluation:
Q3	Date:	
YE	Date:	

III. PERFORMANCE COMPETENCIES for grades 25 through 34

Consider the degree to which each of the following competencies contributes to the employee's effectiveness. When initially setting goals, indicate which competencies will be reviewed. Write comments using work related evidence to describe employee's effectiveness in each performance competency.

1. GOAL SETTING, PLANNING AND ORGANIZING: 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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

2. TEAM EFFORT: 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

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

3. CUSTOMER FOCUS AND QUALITY OF SERVICE: 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..

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

4. DIVERSITY AND INCLUSION: (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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

5. INTERPERSONAL AND COMMUNICATION SKILLS: 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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

6. ORGANIZING AND INITIATIVE: 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..

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

7. ANALYTICAL SKILLS: 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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

8. FINANCIAL MANAGEMENT AND REPORTING (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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

9. DECISION MAKING: (if appropriate) Considers the degree to which employee makes sound decisions and solves problems; obtains and evaluates relevant information of best practices and seeks advice of others as appropriate and communicates decisions in clear, timely manner to all impacted.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

10. ADAPTABILITY: 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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

11. LEADERSHIP: 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 diversity of ideas and respect for difference.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

12. DEPENDABILITY AND RELIABILITY: 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

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

13. DELEGATION: (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.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

14. STAFF DEVELOPMENT: (if appropriate) Considers how the employee manages a diverse group of employees equitably, and effectively assists each staff member in developing his/her/them knowledge, skills and abilities through planning, work experience, coaching and training.

SUPERVISOR/MANAGER COMMENTS:

EMPLOYEE – SELF EVALUATION:

IV. EMPLOYEE PROFESSIONAL DEVELOPMENT ACTION PLAN

Identify professional development goals. Professional development goals relate to the competencies or knowledge, skills and abilities that an employee needs to perform essential functions of his/her current position and/or to prepare him/her for future career growth. These might include areas for improvement, projects that need to be done, or actions that can be undertaken to contribute to the employee's professional development (e.g, attend a training seminar, etc).

Planning and Goal Setting

Reviewer/Supervisor Signature: _____ Date _____

Reviewing Manager/Department Head Signature: _____ Date _____

Employee Signature: _____ Date _____

1st Quarter End - Feedback

Reviewer/Supervisor Signature: _____ Date _____

Employee Signature: _____ Date _____

2nd Quarter End – Mid-Year Review

Reviewer/Supervisor Signature: _____ Date _____

Reviewing Manager/Department Head Signature: _____ Date _____

Employee Signature: _____ Date _____

3rd Quarter End - Feedback

Reviewer/Supervisor Signature: _____ Date _____

Employee Signature: _____ Date _____

Year-End – Annual Review

Reviewer/Supervisor Signature: _____ Date _____

Reviewing Manager/Department Head Signature: _____ Date _____

VI. EMPLOYEE'S COMMENTS (optional)

Employee's comments concerning the performance review may be recorded here:

Employee Signature:* _____ Date: _____

*Employee's Signature implies neither agreement nor disagreement with this performance review. The signature indicates only that the employee has read this evaluation and discussed it with his/her supervisor