

## AT THE BEGINNING OF THE PERFORMANCE CYCLE

### **Employee information**

On the cover page of the form complete all of the requested information including Employee's Name and Title, Evaluating Supervisor's Name, Title and School or Department. Also, type in the date of the assessment stage you are documenting, that is, *Periodic Check-In* or *Final Assessment*.

### **Objectives/Key Responsibilities – June 1-May 31**

#### Overview

Objectives/Key responsibilities are intended to make explicit the outcomes and results each employee will be held accountable for in the coming performance cycle. The manager may create the objectives independently or in collaboration with the employee to ensure proper alignment with strategic priorities and department goals. The manager should finalize the objectives, meet with the employee to discuss and communicate priority of each objective/key responsibility. During the meeting, the supervisor and employee should discuss the upcoming year's goals and it is recommended that supervisors have an open discussion with employees about their expectations and priorities as indicated by the objective/key responsibility weightings given to each one.

#### Instructions

1. Identify three or more objectives/key job responsibilities for each employee for the coming performance period.
  - The form shows boxes for five objectives/key responsibilities. The number of objectives/key responsibilities will depend on the level and scope of the individual's job responsibilities and projects. **Consider your department goals and the University's strategic priorities when creating objectives and specify connection to specific strategic priority.**
  - Ensure objectives/key responsibilities meet the S.M.A.R.T. criteria: (specific, measurable, attainable, relevant and time-bound).
  - Objectives/key responsibilities link to the job being performed. If two or more employees perform the same job responsibilities, objectives and key responsibilities should be the same for all.
2. Indicate a weighting for each objective/key responsibility based on your assessment of the items that are most closely aligned with the strategic priorities.

#### Objective example:

"Greet all visitors to the department and obtain the purpose of the visit, the person with whom they wish to visit, and direct them appropriately. At all times, record messages for those not in the office and obtain the following: name of the visitor, date and time of the visit, purpose of the visit, phone number and/or email address where visitor can be reached, and a brief message for each visitor to the office."

### **Competencies & Mission/Values at Work**

Competencies and Mission/values at work are meant to signify the behavioral aspects of the employee's performance on the job. There are two sets of competencies, **Supervisor** for those with supervisory or governance responsibility for other employees and an **Employee** version for individual contributors. Managers are encouraged to discuss the competencies with employees at the beginning of the cycle to communicate expectations.

### **Professional Development Plan**

The Professional Development Plan is included to identify skills, knowledge, and abilities for future growth, growth in the current job or performance improvement. The Professional Development plan may be unique for each employee unless there is a common skill that needs to be developed by all.

1. Partner with employee to establish a plan to develop skills, knowledge and abilities for future growth and development, growth in the current job, or performance improvement.
2. Provide a timeline for progress.
3. Ensure that employee is compliant in all required training mandated by the University. To confirm the training workshops an employee has completed, ask each employee to attach a copy of his or her training profile.