
PERFORMANCE DEVELOPMENT AND GOAL SETTING – 2024 PRIMER



FOR SUPERVISORS OF STAFF EMPLOYEES



PERFORMANCE DEVELOPMENT OBJECTIVES

- Create alignment and focus on annual goals for the upcoming year
- Reinforce the desired culture of the University through feedback on the Fisher Competencies and achievement of goals in the performance cycle
- Support open discussion and feedback to enable employees to contribute to their fullest
- Determine eligibility for a pay increase effective September 1st 2024

DEVELOPMENT TIMELINE & PROCESS

- **May 13 through June 30:** Supervisors and employees should complete the following actions:
 - Employee starts process by commenting on results against objectives and demonstration of Fisher competencies
 - Supervisor schedules time with each direct report to provide feedback on development in the past year, indicate eligibility for a performance increase, and to determine goals for the upcoming cycle (June 1, 2024 -May 31, 2025).
 - At the meeting, the supervisor and employee **discuss and finalize upcoming goals.**
 - Employee acknowledges conversation with supervisor in the form.
 - Supervisor sends final document (including upcoming fiscal year goals) to humanresources@sjf.edu.
 - Please note: There is no differentiated rating component in the 2023-24 performance period. All employees who meet expectations will be eligible for an increase.

PART A – DISCUSS ANNUAL PERFORMANCE/FISHER COMPETENCIES

- Discuss Development over the last year incorporating the Fisher Competencies (plan for a 30-45 minute discussion)



ST. JOHN FISHER UNIVERSITY ANNUAL REVIEW AND GOAL SETTING

Employee Name: [Click here to enter text.](#)

Job Title: [Click here to enter text.](#)

Supervisor Name: [Click here to enter text.](#)

Review Period: June 2023-May 2024

Part A: Discuss Annual Performance/Fisher Competencies

Demonstration of the Fisher Competencies is expected by all employees. Insert commentary and have a discussion on the degree to which each competency was displayed during the performance period, and the impact to Fisher as a result.

Student-Centered/Customer Service Focused: Responds to student and customer requests for information and services promptly, courteously, sensitively, and effectively. Demonstrates a commitment to improving and supporting the student and customer experience. **Employee comment**

Student-Centered/Customer Service Focused: **Supervisor Feedback**

Collegial: Encourages and demonstrates teambuilding, collaboration, and inclusion. Fosters positive relationships by treating others with respect; speaks honestly and listens carefully. Conveys ideas clearly and respectfully to promote understanding. Deals with conflict appropriately and in a professional manner. Displays foundational Fisher values. **Employee comment**

Collegial: **Supervisor Feedback**



FISHER COMPETENCIES

- Student-Centered/Customer Service Focused**
- Collegial (teamwork; collaboration, inclusion)**
- Accountable**
- Job Knowledge and Technical Ability**
- Culture of Belonging**
- Supervisory Skills (as appropriate)**

PART B – 2023-24 GOAL ACHIEVEMENT

- Discuss Goal Achievement leveraging the goals established at the outset of the performance cycle

Part B: Evaluation of Goals

Insert established 2023-24 Goals, along with commentary on the degree to which they have been achieved.

Goal: Click here to enter text.

Goal: Click here to enter text.

Goal: Click here to enter text.

Goal: Click here to enter text.

Copy/paste additional goals as needed

PART C – EMPLOYEE CONFIRMATION

- After the development discussion concludes, the supervisor asks the employee to sign and date the form.
- The employee's signature confirms a discussion occurred. It does not indicate agreement or disagreement.
- After signing the form, the supervisor scans and sends to humanresources@sjf.edu for tracking and filing

Part C: Final 2023-24 Assessment*

Supervisors, please indicate whether the employee has met expectations for the performance period

Meets Expectations – eligible for compensation increase: Yes/No

*No increases will be issued absent a completed performance review

Confirmation

Employee: I have had an opportunity to have a development discussion with my supervisor.

Signature and Date

PART D – GOAL SETTING FOR FY-24/25

- Simplified goal documentation
- Goals are Outcome focused!
 - See **Development and Goal Setting Process Guide** for sample goals and more on goal setting
- Goals derived from:
 - Job Description/Responsibilities
 - Department Goals
 - University Strategic Plan
- Goal setting should be a collaborative process considering ideas from the employee and supervisor - **final goals are mutually agreed**

Part D: Establishment of New Goals

Keep this portion for your records. Goals will be evaluated at the end of the performance [period](#)

Employee Name: [Click here to enter text.](#)
Supervisor Name: [Click here to enter text.](#)

Job Title: [Click here to enter text.](#)
Goal Period: 2024-2025

Document the employee's goals for 2023-2024. Goals may be derived from job responsibilities, department goals, and/or the University Strategic Plan.

Goal: [Click here to enter text.](#)

Goal: [Click here to enter text.](#)

Goal: [Click here to enter text.](#)

Goal: [Click here to enter text.](#)

Copy/paste additional goals as [needed](#)

ESTABLISHING GOALS (CONTINUED)

- No set number of goals required
- Each employee is **required** to have a goal focused on Professional Development and fostering a Culture of Belonging required for success in their current role.
- Some goals may be so integral to the position that they are **appropriate to repeat each year.**
- Goals should cover primary outcomes expected for the fiscal year
 - Multi-year projects identify the outcomes for this year
- Goals do not need to be documented in priority order

TRACKING PROGRESS (ONGOING)

- ❑ Goals can and should be modified/added/cancelled during the year due to **changing department priorities**
- ❑ Use Part D portion of form during 1:1 meetings throughout the year to discuss goal status
 - Mid-year check-in is especially important if not discussed in 1:1 meetings

QUESTIONS? CONTACT VALERIE BENJAMIN (VBENJAMIN@SJF.EDU)

