



Performance Development and Goal Setting Process Guide

May 2023

Purpose:

The purpose of the process is to:

- Create alignment and focus on annual goals for the upcoming performance year
- Reinforce the desired culture of the University through feedback on the Fisher Competencies
- Support open discussion and feedback to enable employees to contribute to their fullest ability

Process Steps/General Instructions:

The annual Performance Review process aligns with the University's Fiscal year (June 1 – May 31). The form is broken into four parts.

Part A is used to discuss both what was accomplished and how the work was accomplished (the Fisher Competencies).

Part B is used to facilitate a discussion of the degree to which goals for the performance period have been achieved.

Part C is used indicate whether employee meets overall performance expectations and is eligible for a performance increase.

Part D is used to create alignment and focus for the upcoming year by facilitating a discussion and documenting agreed-upon goals for the next year.

Step 1: The supervisor and employee meet to discuss Development and Goal Setting Form.

During this meeting, goal achievement over the past year and demonstration of Fisher Competencies are discussed. A determination as to whether the employee is eligible for a performance increase is indicated in Part C. Goals for the upcoming year are finalized in Part D of the form during this discussion. Employees are welcomed to document accomplishments for the 2022-23 year.

At the conclusion of the discussion, the employee signs to confirm a discussion has occurred.

Step 2: The supervisor sends the signed form to HR for filing



Detailed Instructions:

Development Discussion using Fisher Competencies and Goal Achievement:

The purpose of these sections is to reinforce the desired culture of the University by promoting a discussion of the competencies expected by all Fisher employees in the performance of their work. Performance is not only "what" is accomplished but also "how" the work is accomplished. The descriptions provided describe the types of behaviors expected in the demonstration of the competency. The descriptions are not intended to be an all-inclusive list.

Both the employee and the supervisor should reflect on the degree to which each competency was demonstrated over the past year, as well as goal achievement over the past performance cycle. (June 1 – May 31).

The "Supervisory Skills" competency should be completed only for individuals who have formal supervisory responsibilities. This may include supervision of students or other staff employees. If the employee is not a supervisor, this competency should be left blank or may be deleted from the form.

Determination of increase eligibility:

This year, the University is not instituting a "ladder" performance rating system. Supervisors are instead instructed to indicate whether or not the employee has met performance expectations overall (yes/no). All employees who meet expectations will receive a standard percentage increase to base pay. Only employees who meet expectations will be eligible for an increase. Increases will be effective September 1, 2023.

Establishment of Goals:

Part D of the form is the beginning step of the **upcoming year's** process. To complete this section, the employee and supervisor collaborate in the development of goals. Either the supervisor or the employee may initiate the first draft of goals.

To collaborate on goals, both the employee and the supervisor should review the employee's job description, department/division objectives, and/or the University's Strategic Plan as inputs to the goal-setting process. Goals should focus on key deliverables for the coming year. For most staff employees, the majority of goals will relate directly to their job responsibilities. **All employees are expected to have one goal focused on keeping current in their profession, building on strengths required in their current position, or improving in an area of opportunity required by their current position.**



Goals should be written in a way that describes the intended outcome from the employee's actions. Goals should not be a listing of the activities or steps required to achieve an outcome. **Some goals may be so integral to the position that they are appropriate to repeat each year.** Other goals may be one-time initiatives such as the implementation of a new system or a process-improvement initiative. As a best practice, goals should incorporate how the employee will support a culture of **Belonging and DEI** at Fisher.

There are no set number of goals required. Goals should cover the primary outcomes required in the position for the fiscal year. Typically, 4-6 goals are sufficient. Goals do not need to be documented in priority order. To add additional goals to the form, simply copy and paste one of the earlier goal boxes. If not all the goal boxes are used, they can be left blank or deleted.

See **Appendix A** for examples of goals and a list of action verbs to help in establishing goals.

Employee Accomplishments - Optional:

This open-ended section of the review is an optional section for the employee to complete. It provides a place for the employee to document ways they have contributed to the University over the past year. This may include contributions associated with their position, their department, or to the institution overall.

Suggestions for Supervisors for an effective development discussion:

Supervisors should schedule the meeting in a location that provides for a private, uninterrupted discussion. If this is the first meeting a supervisor has had with an employee, they should let the employee know what to expect in terms of how they approach the meeting.

To provide an opportunity to enhance dialogue, the supervisor should consider starting the session by asking the employee to comment about how they felt about their outcomes and their demonstration of the Fisher Competencies. For example, ask "What outcomes were you most proud of this past year?" The supervisor may follow up with clarifying questions.

The Supervisor can then build off the employee's comments and identify areas of agreement with their own examples. Supervisors should look to provide feedback that reinforces positive outcomes and behaviors as well as being candid on areas for further development. The best feedback is specific and constructive. The supervisor should be sure to listen to the employee as they respond to the feedback the supervisor provides.

Supervisors should think about the following questions as they prepare for the discussion:
"How can I make this discussion meaningful and helpful?"
"What impact do I want to have?"
"What are the core messages I want the employee to take away from our discussion?"



Suggestions for Employees for an effective development discussion:

Employees should focus on listening to the feedback being provided and ask questions for clarification and understanding. Feedback is intended to support employees so they might contribute to their fullest. Employees should use this opportunity to share ideas that would allow them to contribute more fully.

While not a documented part of the process, this would be an appropriate time for an employee to initiate a discussion regarding their overall professional development with their supervisor.

Purpose of a mid-year review discussion:

The best feedback happens in a timely fashion throughout the year. Frequent discussions and informal feedback on goal progress, changes in goal prioritization, and display of the Fisher Competencies are encouraged.

Human Resources sends a mid-year review reminder in November to staff employees and supervisors. The reminder serves to prompt the employee and supervisor to have a mid-year check-in meeting. This is especially important when informal discussions have not taken place.

The employee or the supervisor may initiate the mid-year meeting. The purpose of the discussion is to review progress against goals, to modify goals as required by changing department needs, to recognize achievements to date, and to discuss areas requiring improvement. Ratings should not be discussed during a mid-year review discussion.

This is also an opportunity to get a head start on the formal Performance Review meeting in May/June 2023 by transferring the current year goals from Part B of last year's form onto Part A of this year's form. If changes to the goals are made, they should be noted whether or not they are moved to Part A at this time.

Questions:

Should you have any questions regarding the St. John Fisher University Performance Review process or form, please contact Human Resources at humanresources@sjf.edu .



Appendix A

Goal Examples:

Example 1: Improve student-centered infrastructure by expanding the ability to use Cardinal Cash in all dining locations and the library by spring. Enable a hosted application, which allows parents, students and staff to easily deposit funds into a Cardinal Cash account using credit cards via web and Mobile devices in real-time.

Example 2: Manages supervisor's calendar to enable the supervisor to most efficiently use their time. Supervisor's calendar is kept up-to-date with accurate times, participants, subjects, locations and sufficient travel time. Provides supervisor relevant background information, files, etc., at the end of the day prior to the meeting.

Example 3: Simplify and improve satisfaction with the time-reporting process for employees, students and supervisors by successfully implementing web time entry in FY 20XX for all employee groups. Reduce the time required by staff, faculty and students to report their time. Eliminate unnecessary printing and filing of paper timecards by providing real-time access to prior time cards for supervisors. Minimize disruption through thoughtful implementation, timely communications, and clearly written tools. Continue same level of accurate payroll processing during and after the transition.

Example 4: Increase applications by 5% and deposits by 2% for the incoming year for territory XYZ.

Example 5: Further develop relationships with six target high schools to build awareness of SJFC with students at those schools.

Example 6: Identify no or low-cost training options and complete training protocol to develop enhanced Microsoft Office proficiencies, including basic user skills in Access (database) operations, Excel (pivot table and mail merge), and Word (merge, mailings and track changes) by the end of Q4, 20XX. Demonstrate proficiency by completion of the 20XX mass-mailing project and by providing accurate monthly pivot table summaries of the department budget spending.



Action Verbs for use in goal setting:

Accomplish	Consolidate	Facilitate	Organize	Summarize
Achieve	Construct	Finalize	Originate	Sustain
Acquire	Consult	Finance	Overhaul	Synthesize
Activate	Contract	Forecast	Oversee	Systematize
Adapt	Convey	Formulate	Perform	Teach
Administer	Coordinate	Foster	Persuade	Test
Advance	Counsel	Generate	Prepare	Train
Allocate	Create	Govern	Present	Transform
Analyze	Critique	Hire	Preserve	Translate
Apply	Debate	Host	Preside	Troubleshoot
Approve	Debug	Implement	Prevent	Update
Arbitrate	Define	Improve	Procure	Validate
Arrange	Deliberate	Incorporate	Produce	Write
Assemble	Deliver	Increase	Program	
Assess	Demonstrate	Initiate	Promote	
Assign	Design	Inspire	Provide	
Audit	Designate	Install	Purchase	
Augment	Determine	Institute	Quantify	
Authorize	Develop	Instruct	Rebuild	
Balance	Devise	Invent	Recommend	
Become	Diagnose	Inventory	Reconcile	
Build	Diagram	Invigorate	Reduce	
Calculate	Discover	itemize	Refine	
Calibrate	Dispatch	Launch	Refresh	
Categorize	Disseminate	Lead	Register	
Centralize	Distribute	Make	Reinforce	
Change	Diversify	Manage	Repair	
Choose	Draft	Match	Replace	
Clarify	Drive	Maximize	Resolve	
Classify	Edit	Measure	Respond	
Coach	Elaborate	Mediate	Restore	
Collaborate	Elicit	Merge	Restructure	
Collect	Eliminate	Modernize	Revamp	
Communicate	Empower	Modify	Revolutionize	
Compare	Energize	Monitor	Salvage	
Compile	Enforce	Motivate	Schedule	
Complete	Engineer	Move	Secure	
Compose	Enhance	Multiply	Select	
Compute	Enrich	Navigate	Staff	
Conclude	Ensure	Negotiate	Standardize	
Condense	Establish	Obtain	Streamline	
Confirm	Evaluate	Open	Strengthen	



Fisher Competencies

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.

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.

Accountable: Completes work assignments in a timely manner, delivers high quality work, meets deadlines, and follows established policies and procedures. Demonstrates reliability, delivers on commitments, and takes ownership for actions and results.

Job Knowledge and Technical Ability: Continues to improve skills and stays current in profession; uses technology/equipment appropriately and to increase efficiencies; leverages technology and resources in daily work. Demonstrates the knowledge and skills required to perform their responsibilities effectively and independently while displaying sound judgement.

The following competency should only be completed for an employee with supervisory responsibilities:

Supervisory Skills: Communicates organizational objectives and priorities. Involves employees in setting individual goals, delegates effectively and helps employees develop alternate solutions to overcome challenges. Provides honest, constructive, and timely feedback. Addresses conflicts and performance concerns swiftly and constructively. Trains and coaches appropriately.