
PERFORMANCE DEVELOPMENT AND GOAL SETTING – 2023 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 2023

DEVELOPMENT TIMELINE & PROCESS

- **May 8 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, 2023 -May 31, 2024).
 - 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 2022-23 performance period. All employees who meet expectations will be eligible for an increase.

PART A – DEVELOPMENT CONVERSATION

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

ST. JOHN FISHER UNIVERSITY DEVELOPMENT 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 2022-May 2023

Part A: Discuss Development of 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**

PART B – 2022-23 GOAL ACHIEVEMENT

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

Part B: Evaluation of 2022-2023 Goals

Insert established 2022-23 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



FISHER COMPETENCIES

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

PART D – GOAL SETTING FOR FY-23/24

- 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 2023-2024 Goals

Keep this portion for your records. Goals will be evaluated at the end of the 2023-24 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: 2023-2024

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
- As in previous years, each employee is **required** to **have one goal focused on staying current in their profession and/or improving advancing skills** required in their current job.
- 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
- Best practice – put in a goal relative to supporting **Belonging and DEI** efforts at Fisher

FINAL STEP – 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

*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

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

NEW HIRE PROCESS 2023-24

Employee & supervisor:

- Review Development including any job specific competencies
- Provide any feedback to-date verbally
- Employee and supervisor establish and document goals for the year
- Employee signs acknowledgement form sends to HR by end 3rd month

New hire on the annual process cycle immediately

Supervisors to contact HR as needed to initiate individual development plans

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

