

Nazareth Performance Assessment Process

Supervisor and Employee Guide

January 2024

Agenda

- What is Performance Management?
- Nazareth Performance Management Philosophy
- Nazareth Performance Assessment Process Overview
- Goal & Objective Setting
- Nazareth Performance Assessment Form
- Tips for Conducting a Successful Performance Discussion
- Where do you go for help?
- Questions and Answers

What is Performance Management?

Performance Management is a comprehensive process designed to promote open and transparent communication between supervisors and employees. Its purpose is to enhance an employee's capability to contribute to the accomplishment of the organization's goals and objectives.

The key components of performance management include:

- **Goal and Objective Setting:** Establishing clear and measurable objectives for employees that align with the goals of the organization.
- **Feedback and Coaching:** Providing employees with ongoing, constructive feedback about their performance, strengths, and areas for improvement. As part of coaching, guidance may be provided on skills development and career advancement.
- **Performance Assessments:** Conducting formal evaluations at specific intervals, such as mid-year and end-of-year reviews, to assess an employee's overall performance and accomplishments.
- **Development Action Planning:** Employee and supervisor collaboration to identify training and development opportunities to help the employee grow in their position while addressing areas of opportunity.

Why Is Ongoing Feedback Important?

- Most powerful and useful form of performance management
- Enables “Just-in-Time” feedback
- Helps to create a safe and honest communications environment
- Allows employee time to improve if there are performance issues
- Avoids “You never told me” discussions

Nazareth Performance Management Philosophy

- Clarity of purpose and effectiveness is paramount in recognizing and valuing everyone's role and contribution at Nazareth University.
- A robust performance management program is instrumental in retaining skilled employees, fostering engagement, promoting continuous learning, and cultivating a successful organizational culture.
- Performance Management is not a one-time event. It's a continuous process to ensure employees receive ongoing feedback to perform their jobs effectively.
- Nazareth recommends that Supervisors meet with their employees individually on a weekly or bi-weekly basis in addition to holding formal Mid-Year and Full Year Performance Discussions.



Nazareth Performance Assessment Process Overview

The Nazareth Performance Assessment Process is synchronized with the University's fiscal year, running from July 1 to June 30, and is structured into 4 sections.

- Section 1: Current Year Goal and Objective Setting
- Section 2: Mid-Year Performance Discussion
- Section 3: Full-Year Performance Assessment
- Section 4: Employee and Supervisor Acknowledgement of Full Year Assessment

| Key Dates | Initiative |
|--------------------------|---|
| February 16, 2024 | Supervisors will conduct a "Mid-Year Performance Discussion" to evaluate and document the attainment of performance objectives for the first half and set goals for the 2 nd half of the academic year. |
| July 31, 2024 | A comprehensive Full Year Performance Assessment will be finalized, including discussions and documentation of achievements measured against essential core competencies to complete most assignments successfully. |
| August 14, 2024 | Performance assessments with employee and supervisor signatures will be reviewed by divisional leadership and forwarded to Human Resources. |

Goal and Objective Setting



Goals versus Objectives

Goals define what should be accomplished while objectives define the actions needed to achieve the goal.

Goals

- General
- Intangible
- Broad
- Abstract
- Strategic—long-range direction, set by senior management

Objectives

- Specific
- Measurable
- Narrow
- Tactical—short-range, set by managers to support the accomplishment of goals



S.M.A.R.T. Goals

A SMART goal is an objective that is Specific, Measurable, Achievable, Relevant, and Time-bound and includes the following components:

- **Specific:** Clearly defines what you want to achieve.
- **Measurable:** Establishes criteria to measure progress and determine when the goal has been achieved.
- **Achievable:** Ensures that goals are realistic and attainable.
- **Relevant:** The goal should make a meaning contribution to the achievement of the organizations mission and vision.
- **Time-bound:** Sets a specific timeframe for goal achievement.

Goal Alignment



STRATEGIC FRAMEWORK

Our Values

- Equity
- Community
- Courage
- Empathy
- Integrative Thinking
- Ingenuity
- Transformational Learning

OUR MISSION

Nazareth College fosters integrated learning through action and reflection, educating whole persons who are guided by empathy, committed to equity, and prepared to lead innovation for our time.

OUR VISION

To be a leader of transformative education through action for social justice, preparing and inspiring courageous changemakers for their life's work.

Strategies

| | | |
|--|--|---|
| CHANGEMAKERS Establish Changemakers as the integrative framework for the Nazareth education. | EQUITY MINDSET Prepare the Nazareth community to be equity-minded, socially-just leaders. | EXPANSIVE NAZ Expand innovative models of teaching and learning to reach a wide range of learners navigating their life's work. |
| ENGAGED WITH IMPACT Distinguish every stage of the Nazareth education through engaged learning with social and community impact, from local to global. | CAMPUS-CONNECTED Inspired by the immersive campus experience, students will create community at Nazareth and beyond. | |

Measurable Outcomes



Nazareth University
Goals and Objectives

Department Goals
and Objectives.

Employee
Goals and
Objectives



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Goal & Objective Setting

1

Step 1. Review Employee Job Description

A job description is a formal agreement between an employer and employee that ensures clarity and mutual understanding of job requirements and expectations.

The Job Description includes:

- The position summary
- Key job responsibilities
- Required competencies
- Supervisor responsibility (if applicable)



Setting Goals and Objectives- Example

| Example | A Good Start: Draft Goal | A Strong Finish: SMART Goal |
|--|-------------------------------------|--|
| If the focus is to reduce department expenses... | Lower department expenses. | Reduce department expenses by 5% versus previous fiscal year by following the new purchasing process for lab supplies. |
| If the focus is on an IT project... | Complete new system implementation. | Complete and implement the new HRIS system by May 1, 2024, through effective collaboration across the HR and IT teams. |

Strive for SMART goals and objectives!

- S**pecific
- M**easurable
- A**chievable
- R**esults-oriented
- T**ime-bound



Setting Goals and Expectations

2

Draft individual goals: Help your employee identify 3-5 goals for the upcoming year/cycle. At least 3 goals should support department/unit goals and one goal should support ongoing job responsibilities/professional development. If your employee is a supervisor, a goal should be set that directly links to that part of their role. Goals may be accomplished over several years.

Your employee will document the following for each goal:

- ✓ Goal description
- ✓ Action steps to achieve goal
- ✓ Metrics/what success looks like
- ✓ Required resources
- ✓ Target completion date



Conducting a Successful Performance Discussion



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Prior to the Meeting – Data To Consider

Tools that you can use as you prepare your annual review documentation

- ✓ Job Description and Annual Goals/Objectives
- ✓ Supervisor's direct experience, observations and knowledge of employee's performance
- ✓ Supervisor's "Drop File"
- ✓ Meeting notes/summaries, compliments and concerns from constituents, previous annual reviews, other performance documents
- ✓ Employee Performance Feedback
- ✓ Performance/contribution against agreed upon expectations



Annual Performance Appraisal

Conducting the Meeting

- Schedule in advance.
- Ensure there are no interruptions .
- Allow ample time for the meeting.
- Set a positive and welcoming tone.
- Discuss employee feedback, supervisor feedback, and individual development plan.
- Reconcile major differences where needed.
- Discuss career goals and definition of rating categories.
- Review edits to job description and individual development plan and enhance as needed.
- Clearly summarize employee and supervisor action items.



Nazareth University Performance Assessment Form



Section 1. Current Year Goal and Objective Setting

NAZARETH UNIVERSITY PERFORMANCE ASSESSMENT PROCESS

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

Job Title: [Click here to enter text.](#)
Review Period: July 2023 – June 2024

Section 1. Current Year Goal and Objective Setting

Insert 2023-2024 employee performance goals and professional development actions below.

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

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

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

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

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

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

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

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



Section 2.

Mid-Year Performance Discussion

Section 2. Mid-Year Performance Discussion

Insert 2023-2024 performance goals and development activities accompanied by commentary on the extent to which they have been accomplished during the first half of the academic year.

Goal: Click here to enter text.

Goal: Click here to enter text.

Goal: Click here to enter text.

Goal: Click here to enter text.

Development Activity: Click here to enter text.

Development Activity: Click here to enter text.

Development Activity: Click here to enter text.

Development Activity: Click here to enter text.

Employee comment

Supervisor feedback

REMINDER:
Mid-Year Performance
Discussions should be
completed by
February 16, 2024



Section 3. Full Year Performance Assessment

Section 3. Full-Year Performance Assessment

Demonstration of Core Competencies

Successful completion of Nazareth assignments requires a demonstration of critical core competencies. Include commentary and discuss the extent to which each competency was demonstrated during the performance period.

Rating Definitions

| MEETS EXPECTATIONS | REQUIRES IMPROVEMENT | EXCEEDS EXPECTATIONS | NOT APPLICABLE |
|--|---|--|----------------|
| Accomplishes established objectives and meets the University's high standards for performance. Demonstrates continued professional development. Performance requires an appropriate degree of supervision. | Performance is below established objectives. Additional development is required. Performance requires a high degree of supervision. | Job performance significantly exceeds objectives. Performance approaches the best possible standard. Requires minimal supervision. | |

Student-Focused / Constituent-Driven: Provides information and services promptly, kindly, and effectively to students and/or constituents. Demonstrates a commitment to assist constituents and students within the framework of institutional policies and procedures to support and enhance their experience.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations]

Interpersonal Skills: Encourages and demonstrates open communication, collaboration, teamwork, and professionalism. Cultivates positive working relationships by treating others with dignity and respect. Promotes understanding through effective communication. Skillfully manages conflict in a professional manner.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations]

Accountability: Delivers high-quality work, meets deadlines, and adheres to established policies and procedures. Takes responsibility for actions and results, demonstrates reliability, and keeps commitments. Observes attendance policies, respects others' time, is punctual, and follows standard operating procedures.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations]

REMINDER:
Full-Year
Performance
Assessments should
be completed by
July 31, 2024



Section 3. Full Year Performance Assessment

Section 3. Full-Year Performance Assessment

Skills and Abilities: Demonstrates the knowledge and skills required to perform their position effectively and independently while displaying sound judgment and decision-making. Prioritizes skill development and uses technology appropriately to increase productivity and efficiency while promoting forward thinking.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations]

Nazareth Values: Role models Nazareth values (Equity, Community, Courage, Empathy, Integrative Thinking, Ingenuity, and Transformational Learning) in their daily work.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations]

The following competency is for employees with supervisory responsibility.

Supervisory Skills: Works collaboratively to define appropriate goals, objectives, and priorities to implement the University's mission, vision, and strategic priorities. Role models University values. Defines work assignments effectively and encourages employees to develop alternative solutions to overcome challenges. Provides employees with honest, constructive, and timely feedback. Addresses conflicts and performance concerns in a constructive and timely manner. Coaches and develops employees to ensure achievement of consistent levels of high performance.

Employee comment

Supervisor feedback

Rating: [Meets Expectations] [Requires Improvement] [Exceeds Expectations] [Not Applicable]

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

Meets Expectations: Yes/No

Supervisor Performance Summary:

Employee Comment

REMINDER:
Full-Year
Performance
Assessments should
be completed by
July 31, 2024



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Section 4. Employee and Supervisor Acknowledgment

Acknowledgment

I acknowledge that I have had the opportunity to discuss this performance assessment with my supervisor and have received a copy of this evaluation.

Employee Signature:

Date:

Supervisor Signature:

Date:

REMINDER:
Full- Performance
Assessments should
be completed by
August 15, 2024



Where do I go for help?

Supervisors

- Direct questions to Human Resources

Employees

- Direct questions to your supervisor

In Closing.....

Performance Assessment Process

“Employee and Supervisor Collaboration”

Your Role as Supervisor

1. Clearly communicate expectations re: job responsibilities and competencies (skills) and behaviors
2. Communicate how individual goals and objectives align with department and organization goals
3. Help your employees set clear, measurable performance objectives
4. Offer advice and guidance regarding your employee’s performance on a consistent, on-going basis, not just annually

Your Role as Employee

1. Understand how your role aligns with division and department goals, and actively participate in setting expectations
2. Work with you supervisor to set clear, measurable performance objectives
3. Monitor your own performance compared to expectations
4. Seek advice and guidance as needed from supervisor



Next Steps

Supervisors

- Familiarize yourself with presentation details
- Create opportunities for ongoing feedback/dialogue with employees
- Adhere to Nazareth University Performance Assessment Process timeline and deliverables

Employees

- Familiarize yourself with presentation details
- Actively participate in Nazareth Performance Assessment Process