

NON-FACULTY PERFORMANCE REVIEW

Review Period: 2/1/2016 To 1/31/2017

Name: Victoria Lopez Herrera	Title: Associate Director	EMPL ID: 6001041367	Job Code: 10842
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Section I. ESSENTIAL JOB FUNCTIONS/RESPONSIBILITIES

List the essential job functions/responsibilities of this employee. These are the major responsibilities of the job. It defines the job (along with the reason it exists). Typically this would include 5-8 key essential job functions and can be found in the job description or position description.

Essential Job Function 1

ESSENTIAL JOB FUNCTIONS	RATING: SP+
Provide leadership, direction and mentoring for the Assistant Director for Marketing and Communications, the Administrative Associate and approximately 14 student staff.	
STANDARD <ul style="list-style-type: none"> o Conduct individual weekly meetings with direct reports to discuss issues, provide guidance, review the week ahead and plan for upcoming events and challenges. o Set and follow-up on expectations of programs and services. o Ensure that staff understands ways to improve in their area in accordance with the Excellence in Programming and Services Model. o Conduct a mid-year review and planning meeting with professional staff under your supervision. 	
COMMENTS <ul style="list-style-type: none"> o Victoria does a good job ensuring that her director reports are informed. She does a good job letting me know about upcoming events and possible challenges. o Victoria did a great job during the Spring 2016 semester with both of her full-time staff positions being vacant. She was able to manage the student staff and workload of both areas with the assistance of student leaders during the transition. The added workload and demand of my time was challenging however; she was able to balance everything and accomplish work. o The hiring of two replacement positions was new to Victoria, after a learning the system, she successfully recruited, hired and trained two new professionals. o All necessary probationary evaluations with the Administrative Associate were completed on time. o Both of her direct reports have been given the freedom to create new systems and solutions for managing their workload and flow of information. Both professionals are succeeding in their roles and leading the student staff. 	

Essential Job Function 2

ESSENTIAL JOB FUNCTIONS	RATING: SP+
Plan, develop and provide ongoing student staff training and student staff development programs.	
STANDARD	

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- o Confer with the professional staff to evaluate the effectiveness of training programs and provide recommendations for development or modifications to improve existing programs.
- o Anticipate and identify issues and areas of improvement and produce viable and logical solutions. Provide support for the enhancement and development of programs.
- o Develop and organize training manuals, multimedia visual aids, and other educational materials.
- o Conduct new staff orientation sessions.

COMMENTS

- o Due to budget reasons, the Student Management Retreat did not occur and instead the department hosted on-site Development Days. The focus of the two days was on facilitation skills and I feel the goal were met however; there is much room for improvement given the new space parameters and budget constraints. It has been suggested that the same experimental learning activities and group work that occurred at the retreat is implemented into the new training format.
- o Victoria continues to do a great job in planning and implementing the Student Supervisory Institute. Victoria did a great job of soliciting student leaders to co-facilitate the sessions. Each year she utilizes student input to make modifications to the program. In the Fall she piloted hosting the mock interviews the week following the Institute to better accommodate professional staffs' schedule and create real interview scenarios. The Spring 2017 will see changes to the name of the program to the Emerging Leaders Institute and a partnership with The Leadership Takeover.
- o Victoria, for the second year, lead the collaborative effort of partnering with Housing and Residence Life, Campus Living Villages and the University Center for student staff training January 2017. Having approximately 500 student staff in attendance it presented logistical challenges, but was overall a great success. Victoria did a great job leading this initiative and she gained valuable experience on managing the personalities of colleagues from three different divisional areas. At this time each campus partner has said they would like to partner again for Spring 2018. I would like to see the remainder of offices in Student Life join this collaborative staff training initiative.
- o Victoria is currently working with Human Resources to create an online New Student Staff Orientation online module. The goal is to pilot the program in the Summer and have it utilized for the Fall of 2017.

Essential Job Function 3

ESSENTIAL JOB FUNCTIONS

Determine needs, establish goals, set direction and evaluate the Marketing and Communications area.

RATING: SP

STANDARD

- o Set goals with the Assistant Director for their programming area prior to each semester.
- o Monitor the program area throughout the year via on site evaluation and one-on-one meetings with the Assistant Director.
- o Review and evaluate success of programs, along with data collected from program surveys at the conclusion of each program and/or semester.

COMMENTS

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- o From February to July, Victoria managed the area and directly supervised the student staff. She was fortunate that the previous Assistant Director had schedule out work for several months and that there was competent student staff in place.
- o She was able to successfully manage communication and workflow during the search for a new professional staff member. The new Assistant Director for Marketing and Communications joined the department in July.
- o During the Fall semester the focused was on acclimation to collegiate recreation and current systems. Victoria has embraced the "outsider's perspective" to help us critically examine our practices, data collection and future work in this area.

Essential Job Function 4

ESSENTIAL JOB FUNCTIONS

RATING: SP

Determine needs, establish goals, set direction and evaluate the management of the front office.

STANDARD

- o Set goals with the Administrative Associate II prior to the start of the semester.
- o Monitor the front office operations throughout the year via on site evaluation and one-on-one meetings with the Administrative Assistant.
- o Review and evaluate the hiring and termination process for student staff.

COMMENTS

- o Victoria oversaw the management of the area from April to June while searching for a replacement.
- o The new Administrative Associate has initiative, is professional and manages the area effectively.
- o Victoria consistently meets and is successfully supporting her growth in the role.

Essential Job Function 5

ESSENTIAL JOB FUNCTIONS

RATING: SP

Manage the Student Development budget and oversee budget management for Communications.

STANDARD

- o Prepare and manage the budget for student staff training and development.
- o Provide leadership and guidance to the Assistant Director of Communication as they prepare their respective budgets for the next fiscal year.
- o Review Order Sheets prepared by Assistant Director prior to purchasing equipment to ensure that the purchase is in accordance to their budget, that funding is available by checking Quicken and that all paperwork is included and properly completed.

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o Oversee the equipment depreciation schedule or program areas.

COMMENTS

Essential Job Function 6

ESSENTIAL JOB FUNCTIONS

RATING: SP+

Chair and participate in departmental committees.

STANDARD

- o Serve as chair of the All-Staff Training Committee, Student Management Team Committee, and Professional Development Committee.
- o Serve on additional departmental committees as needed.

COMMENTS

- o Victoria continues to successfully chair departmental committees and progress continues to be made.
- o Victoria schedules regular meetings, created the agendas, maintains progress notes, and keeps the committees on task.
- o In the summer of 2016, Victoria consolidated the training committee and student management team committees. After reviewing the workload and scheduling she felt it was best to consolidate efforts and meet weekly throughout the year instead of hosting multiple meetings.
- o The committees produce quality work and are able to address departmental needs in a meaningful way.

Essential Job Function 7

ESSENTIAL JOB FUNCTIONS

RATING: SP+

Provide ongoing training and development for professional staff.

STANDARD

- o Train professional staff in techniques and skills for training and teaching employees.
- o Research new technologies and methodologies in workplace learning and present this research to professional staff. Implement where appropriate.
- o Serve as the chair of the professional staff development committee.

COMMENTS

- o Victoria has been able to lead the Professional Development Committee in identifying the theories and models we use as department.
- o Victoria has scheduled education sessions for the professional staff on the theories and models the department has decided to utilize.

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o Victoria was given the opportunity to present at a Student Life Director's meeting to initiate the development of shared learning outcomes for the students within the division. After this meeting she was given to go ahead to work with representatives from each department to create this set of learning outcomes. Victoria held the initial meeting and will lead this group to ensure that divisional student learning outcomes are establish by Fall of 2017.

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Section II. PROJECTS

List the special projects that have been assigned to this employee for the year (typically major projects would not exceed 3-4). Some employees may not have special projects assigned at all.

No Projects reported for employee

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Section III. DEVELOPMENT PLANS

Employees are always encouraged to actively engage in self development affairs. Identify specific work assignments, training (courses/classes, skills, books, magazines, seminars or CEU's) designed to increase the individual's effectiveness in present job and/or prepare for future job assignments

** While this section will not have a rating, it should be a factor used to determine overall performance. **

Development Plan 1

TRAINING/SKILLS REQUIRED

Attend NIRSA Annual Conference

Due/Compl Date: 04/06/2016

COMMENTS

Victoria attended the conference. She and Nigel co-presented on the topic of Student Development.

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Section IV. ATTRIBUTES

- For each attribute in which an employee is rated "Outstanding" or "Improvement Needed" comments are required
For each attribute in which an employee is rated "Solid Performance" comments are not necessary, but are desirable

TEAMWORK	Rating: O
Victoria continues to be a strong team player across the division of Student Affairs. This includes continuing to the Beaks Up Speak Up! Implementation Committee, partnerships for Spring Training, and ELI/Leadership Takeover. She is a strong leader of the committees in which she is the chair.	
SERVICE ORIENTATION	Rating: SP+
Victoria continues to maintain good rapport with co-workers and student staff. She follows through on work commitments and big projects.	
COMMUNICATION	Rating: O
Victoria has strong communication skills. She is able to provide positive and corrective feedback and address issues with colleagues in a professional and tactful manner.	
ADAPTABILITY	Rating: O
Victoria is flexible and able to navigate changes well. She demonstrated this well during the Spring/Summer when overseeing the Office, Marketing & Communication and Student Development during transition of staff.	
INNOVATION, CREATIVITY & INITIATIVE	Rating: SP+
Victoria approaches work through the lens of seeking to improve the student experience. She is open to new ideas and feedback. She strives to ensure the department is being intentional with its offerings.	
MOTIVATION	Rating: SP
Victoria maintains a positive attitude and encourages others.	
JOB KNOWLEDGE	Rating: SP+
Victoria continues to be strategic about the types of professional development opportunities she participates in with an effort to enhance her skills and serve the department's needs.	
JUDGEMENT	Rating: SP+
Victoria continues to demonstrate solid judgment skills. She takes time to critically review issues before making a decision. She is comfortable with seeking guidance from her supervisor.	
QUANTITY & PRODUCTIVITY	Rating: SP
She is able to take on additional duties and successfully manage all of them. She plans in advance and makes every effort to meet deadlines.	
QUALITY	Rating: SP
Victoria produces quality work that is professional, organized and can be easily understood by a variety of audiences.	

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Section V. SUPERVISORS ONLY

Please complete this page of attributes (in addition to the previous page) for employees. Supervisor for purposes of this exercise is defined as those who have the responsibility of supervising others, whether in a formal capacity (e.g., by title) or informal. Supervisors will be rated on 15 attributes (total). \NComments are not required for a rating of "SP"

STAFF DEVELOPMENT

Rating: SP+

Victoria continues to provided mentoring and guidance to her direct reports that includes praise for their accomplishments and opportunities for growth. She provides space for her supervisees to take ownership of their area.

DECISION MAKING

Rating: SP

Victoria is solution oriented. She works to ensure the best interest of the department and staff is central to making decision.

LEADERSHIP

Rating: SP+

Victoria is a positive role model to her staff and within the department. She is committed to the strategic initiatives of the department and ensure that the initiatives are instilled within student learning outcomes. She is able to convey the purpose of her work and the importance of everyone in the department to contribute to student development.

PROMOTES DIVERSITY

Rating: SP+

Victoria is passionate about diversity and inclusion and have demonstrated this by participating and contributing to initiatives in NIRSA and her daily work.

COMPLICANCE, ACCOUNTABILITY & RISK MANAGEMENT

Rating: SP

She continues to abide by all policies and procedures and ensures the same of the staff that she supervises.

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OVERALL RATING

PERFORMANCE SUMMARY/MANAGER'S COMMENTS

Rating: SP+

Victoria continues to be a valuable member of the Campus Rec team and is respected by her peers. She has done a good job mentoring her direct reports and many of the student staff. She encourages them to be innovative and independent. She does a great job representing our department on various committees within the university and our national association. She is a facilitator for both True Colors and Beaks Ups Speaks Up.

EMPLOYEE COMMENT