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| --- | --- | --- | --- |
| **Employee Name** | Click or tap here to enter text. | **Position Title** | Click or tap here to enter text. |
| **Start Date** | Click or tap to enter a date. | **College/Division** | Click or tap here to enter text. |
| **Review Date** | Click or tap to enter a date. | **Manager Name** | Click or tap here to enter text. |

Performance & Development is a cyclical process. This form has been developed to help managers and employees continuously evaluate performance throughout the year. Use the timeline below to determine where we are in the Performance & Development cycle. You can save your progress and return to the form throughout the year. If you have any questions about the Performance & Development process, please contact your [HR Business Partner](https://service.northeastern.edu/hr?id=kb_article&sysparm_article=KB000420053).

## **Performance & Development Timeline:**

**Click for** [**Goal Setting**](#_GOAL_SETTING_(Fill) **Click for** [**Mid-Year**](#_MID-YEAR_REVIEW_(December/January)) **Click for** [**Evaluation**](#_YEAR-END_ACCOMPLISHMENTS_)

While the visual gives you an overall sense of what happens when, it’s important to review performance and solicit/provide feedback regularly throughout the year.

As always, check with your local division/college for any internal deadlines.

## **Resources and Training**

There are a number of resources and training materials to guide you through the cycle:

* [The FAQs and articles in the HR Service Center](https://service.northeastern.edu/hr?id=kb_category&kb_category=27afde96db7b1c10d708175948961912) can provide general information about the cycle, and [this article provides specific information and resources](https://service.northeastern.edu/hr?id=kb_article&sysparm_article=KB000017663) around the part of the cycle that we are currently in.
* [Overview videos and other training can be found in our course on Performance & Development](https://northeastern.instructure.com/courses/30214).
* Need to speak to someone about your goals, self-assessment, or employee evaluation? [Talk to an HR Business Partner](https://service.northeastern.edu/hr?id=sc_cat_item&sys_id=1ba4d67cdb0bd4501aceaf6d13961961&sysparm_category=75baad68db8b94501aceaf6d13961927). Select the inquiry type “Ask an Expert”.

## [**Goal Setting**](#_GOAL_SETTING_(Fill)

Complete this section before or at the start of the fiscal year (**typically July/August**). Establish three to five goals. Describe each goal and its relation to the [university mission](https://president.northeastern.edu/priorities/) and any divisional/college goals. Be sure to outline how each goal will be measured and its achievement verified. Include expected outcomes, quality measures, dates, timelines and/or descriptive narrative. A minimum of one goal should reflect plans for personal growth and development.

## [**Mid-Year Review**](#_MID-YEAR_REVIEW_(December/January))

Complete this section midway through the performance and development process (**typically, December/January**). Review progress toward goals, key job responsibilities, skills and competencies, and performance to date. Document the discussion here and if goals or priorities change, revise accordingly. Be sure to capture the date it occurred.

## [**Year-End Accomplishments**](#_YEAR-END_ACCOMPLISHMENTS_)

This section is used to evaluate performance over the past year. Accomplishments and performance are measured in three areas: achievement of goals; effective use of skills and competencies; and performance overall.

Outline results achieved and include any comments, feedback and examples of good performance, significant achievements, skills applied or in need of improvement here. Managers assign [ratings](https://assets.hrm.northeastern.edu/pdfs/resources/performance-development/Ratings.pdf) for each goal, the job performance, and the individual skills using the metrics and job expectations identified and discussed at the start of the cycle or the project.

| **MID-YEAR REVIEW** (December/January) |
| --- |
| Click or tap here to enter text. |

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| **Mid-Year Review Date** | Click or tap to enter a date. |

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| **GOAL SETTING** (Fill out Goals/Metrics in June/July/August) |
| **YEAR-END ACCOMPLISHMENTS** (Fill out Results/Ratings in March/April/May) |

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| **Goal:**  Click or tap here to enter text. | | | | |
| **Measurement(s)/Metric(s):**  Click or tap here to enter text. | | | | |
| **Results:**  Click or tap here to enter text. | | | | |
| **Rating** | Choose an item. |  |  |  |

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| --- | --- | --- | --- | --- |
| **Goal:**  Click or tap here to enter text. | | | | |
| **Measurement(s)/Metric(s):**  Click or tap here to enter text. | | | | |
| **Results:**  Click or tap here to enter text. | | | | |
| **Rating** | Choose an item. |  |  |  |
|  |  |  |  |  |
| **Goal:**  Click or tap here to enter text. | | | | |
| **Measurement(s)/Metric(s):**  Click or tap here to enter text. | | | | |
| **Results:**  Click or tap here to enter text. | | | | |
| **Rating** | Choose an item. |  |

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| --- | --- | --- | --- | --- |
| **Goal:**  Click or tap here to enter text. | | | | |
| **Measurement(s)/Metric(s):**  Click or tap here to enter text. | | | | |
| **Results:**  Click or tap here to enter text. | | | | |
| **Rating** | Choose an item. |  |  |  |

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| --- | --- | --- | --- | --- |
| **Goal:**  Click or tap here to enter text. | | | | |
| **Measurement(s)/Metric(s):**  Click or tap here to enter text. | | | | |
| **Results:**  Click or tap here to enter text. | | | | |
| **Rating** | Choose an item. |  |  |  |

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| **KEY JOB RESPONSIBILITIES** | |
| Click or tap here to enter text. | |
| |  |  | | --- | --- | | **Rating** | Choose an item. | | |

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| **SKILLS AND COMPETENCIES** | | |
| Competency | Definition | Ratings |
| **Values and Integrity** | Upholds the utmost standards of integrity and ethics; conducts themselves in compliance with legal/regulatory requirements and university policies. | Choose an item. |
| **Embracing Diversity of Thought** | Values and leverages different perspectives; is willing to change one's mind. | Choose an item. |
| **Adaptability/Flexibility** | Takes change in stride; works to address potential issues and adjusts schedule or focus areas to respond to new priorities. | Choose an item. |
| **Effective Communications: Up, Down & Across** | Takes ownership and plays an active role in regular communications - throughout the network; effectively communicates with different groups and constituencies. | Choose an item. |
| **Decision Making & Problem Solving** | Makes effective and timely decisions; solves problems incorporating multiple perspectives; thinks about over-arching considerations when making decisions. | Choose an item. |
| **Delivering Results** | Focuses on outcomes; does what it takes to achieve goals and objectives; achieves both quality and completion criteria; measures progress; uses resources effectively. | Choose an item. |
| **Focus on the Customer** | Is service-oriented; provides consistent, exceptional customer service experiences; seeks input of customers; adapts to meet their needs. | Choose an item. |
| **Initiative** | Identifies ways to improve work processes and procedures; makes suggestions and, where appropriate, takes action to make the changes happen. | Choose an item. |
| **Professional/Technical Knowledge** | Develops and maintains expertise within own area, function or field of study and gains the trust and respect of colleagues. | Choose an item. |
| **Teamwork & Collaboration** | Works effectively in a team environment to get work done to reach the best possible solutions; focuses on the objectives and results at the team level; works well with a wide range of people. | Choose an item. |

| **LEADERSHIP SKILLS AND COMPETENCIES (for supervisors of staff only)** | | |
| --- | --- | --- |
| Competency | Definition | Ratings |
| **Developing People**  **(Self & Others)** | Constantly improves, grows and develops self and others to reach higher and broader levels; always preparing the next generation of leaders; actively maintains an accurate assessment of self and others including strengths and weaknesses. | Choose an item. |
| **Managing Resources Effectively** | Manages staff and resources effectively; delegates appropriately; aligns and distributes work efficiently to achieve goals. | Choose an item. |
| **Leading Innovation & Change** | Inspires and leads others to innovate and make change happen; develops and articulates a vision for the organization – vividly describes the destination; works to move things forward to reach the next level. | Choose an item. |
| **University Wide Perspective** | Takes action and leads based on a big picture understanding; thinks strategically and knows how their part connects to the whole and how the whole impacts their part; uses the overall University vision/mission to guide action in own area. | Choose an item. |

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| **Overall Performance Rating (See** [**Performance Rating Definitions**](https://assets.hrm.northeastern.edu/pdfs/resources/performance-development/Ratings.pdf)**)** | Choose an item. |

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| **Development Discussion** |
| Click or tap here to enter text. |

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| **Manager Comments** |
| Click or tap here to enter text. |

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| **Employee Comments** |
| Click or tap here to enter text. |
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| **SIGNATURES\*** | | |
| **Employee’s Signature and Date:** |  |
| **Manager’s Signature and Date:** |  |
| **Next Level Manager’s Signature and Date:** |  |

Access instructions for e-signatures using Adobe Sign [HERE](https://service.northeastern.edu/tech?id=kb_article&sys_id=85d4392fdb805410bb9fdbf0ce9619d7).

\*Employee’s signature implies neither agreement nor disagreement with this evaluation. The signature indicates only that the employee has read this evaluation and discussed it with the manager.