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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** [**Expectation Setting**](#_SETTING_EXPECTATIONS_(July/August)) **Click for** [**Mid-Year**](#_MID-YEAR_REVIEW_(December/January)) **Click for** [**Evaluation**](#_YEAR-END_ACCOMPLISHMENTS_(March/Apr)

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) and select the inquiry type “Ask an Expert”.

## [Setting Expectations](#_SETTING_EXPECTATIONS_(December/Janu)

Complete this section before or at the start of the fiscal year (**typically July/August**) to establish and clarify performance expectations. Discuss how the work relates to the [university mission](https://president.northeastern.edu/priorities/) and divisional/ college goals and how performance will be measured and assessed. Review the performance & development process and set times for check-ins throughout the year.

| SETTING EXPECTATIONS (July/August) |
| --- |
| Click or tap here to enter text. |

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| --- | --- |
| **Expectations Discussion Date** | Click or tap to enter a date. |

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

Complete this section midway through the performance and development process (**typically, December/January**). Review the expectations, key job responsibilities, skills and competencies, and performance and progress to date. Document the discussion here and be sure to capture the date it occurred.

| 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. |

## [Year-End Accomplishments](#_YEAR-END_ACCOMPLISHMENTS_(March/Apr)

This section is used to evaluate performance over the past year. Accomplishments and performance are measured in three areas: demonstration of key job responsibilities; 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) to the individual skills and overall job performance based on the metrics and/or expectations identified and discussed at the start of the cycle.

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| YEAR-END ACCOMPLISHMENTS (March/April/May) |

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 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.