

Lafayette College

Performance Management Process

(2024)

Employee's Name

Employee's Job Title

Employee's Department

Reports to (Name)

Reports to (Title)

REVIEW PERIOD

From: _____ **To:** _____

Successful Lafayette employees work to achieve their division's goals, support their colleagues' goals, and further the College's overall mission. In performing their work, the most successful employees work collaboratively to provide superior service to internal and external customers and constituencies, identify innovative approaches to address challenges facing the College, and demonstrate responsible stewardship of Lafayette's resources.

Goal Planning and Performance Management Procedure:

The goal of the College's performance evaluation process is to promote, on a regular basis, ongoing two-way discussion and review of employee performance. The performance management form provides a mechanism for the supervisor and employee to discuss annual performance. The College's performance management process consists of three parts: 1) Position Review and Goal Planning, which is done at the beginning of the review period; 2). Routine progress check-ins throughout the year, and 3) Performance Evaluation, completed at the end of the review period using this form.

Goal Planning:

The supervisor and employee should establish reasonable goals/responsibilities at the beginning of each year.

Periodic Progress Meetings:

The supervisor and employee meet throughout the year to discuss the progress toward goal attainment. At that time, details are noted regarding steps completed or still to be accomplished. If appropriate, adjustments may be made to the goal-setting plan, but normally, a completely new list of goals should not be made during these periodic discussions. Some goals may take more than a single year to complete.

Performance Evaluation Instructions:

The performance evaluation period is between April 1 of the prior year and March 31 of the current year. Evaluations for full-time administrators will be conducted between **April 1 and April 30**. The components of the performance management process include the following:

1. Employee completes Section 1 and the *Employee Reflections* section.
2. The supervisor reviews Section 1 and the *Employee Reflections* section before completing the Performance Evaluation. Supervisor completes Sections 2-6 and Summary Rating.
- 3. Before sharing anything with the employee, the supervisor must review the Performance Evaluation Form and ratings with the department head, followed by the senior leader (vice president).**
4. The supervisor sets the time, date, and location for the meeting with the employee.
5. Only after the supervisor and the employee have met to discuss the Performance Evaluation Form should the supervisor sign off on the form.

6. The employee may add comments, sign off on the form, and return it to the supervisor.
7. The supervisor scans and emails the completed signed document to the Office of Human Resources at hroffice@lafayette.edu.

1. POSITION OVERVIEW/KEY OBJECTIVES/GOALS: *(To be completed by the employee; additional pages may be attached)*

Position Overview: *Provide a brief overview of the position's key responsibilities (the job description may be attached).*

Key Objectives/Goals: *Provide a list of the top 3-5 major goals or objectives set for the employee for the review period.*

Employee Reflections:

What went well this year?

What could have improved, and how will you address those issues?

How did you support the College community this year (i.e., diversity and inclusion, sustainability, student support, volunteer activities, committee participation, etc.)?

What could help you better meet your professional development goals?

SUPERVISOR EVALUATION: (Complete the next sections of the evaluation using the rating scale below.)

RATING SCALE

Significantly Exceed Expectations	Performance far exceeds expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in a consistently superior overall quality of work. Performance includes the completion of a major goal or project or exceptional or unique contribution in support of department or college objectives. Demonstrates unique understanding of work beyond assigned area of responsibility, is exceptionally flexible to change and assists others in understanding change. Achievements and abilities are obvious to subordinates, peers and managers and other constituents; are recognized as an expert in their job area. Contributes to the College's success beyond job requirements. Achievement of this level of performance is rare.
Exceeds Expectations	Performance consistently exceeds expectations in all essential areas of responsibility, and the quality of work overall is excellent. Regularly takes on more than is required and takes the initiative to obtain information or clarification of policies, procedures, and objectives. Anticipates issues and suggests and/or takes appropriate action. Employee meets and often exceeds annual goals and objectives. These employees are role models and often take initiative beyond daily job duties. They clearly understand the connection between job responsibilities and the impact their work has on areas of the College and are flexible in responding to changing conditions that may require adjustment. Achievement of this level of performance is infrequent.
Meets Expectations	Performance consistently meets expectations in all essential areas of responsibility and, at times, possibly exceeds expectations. Overall, the quality of work is very good. The most critical annual goals are met and contributions to the department/team are positive and consistent. Performance is "on track", expectations are fully achieved and work is performed independently and competently. These employees also recognize, participate in, and adjust to changing situations and work.
Needs Improvement	Performance does not consistently meet expectations and fails to meet expectations in one or more essential areas of responsibility and/or fails to complete one or more of the most critical goals. The need for improvement and development has been periodically communicated to the employee throughout the review period. Performance may negatively impact the work of other employees or work units.
Unsatisfactory	The employee does not display competence in most aspects of their position or some critical aspects of the position. The employee requires frequent close supervision, and immediate, significant performance improvement is required.

2. Key Responsibilities, Objectives, and/or Goals:

Please describe and rate the employee's key responsibilities, objectives, and/or goals in this section and describe specific accomplishments or examples during this review period. (Minimum of 3 are required)

Responsibilities/ Objectives/Goals	Describe the Employee's Performance	Rating
		<input type="checkbox"/> Significantly Exceeds Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory
		<input type="checkbox"/> Significantly Exceeds Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory
		<input type="checkbox"/> Significantly Exceeds Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory

Responsibilities/ Objectives/Goals	Describe the Employee's Performance	Rating
		<input type="checkbox"/> Significantly Exceeds Expectations <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Needs Improvement <input type="checkbox"/> Unsatisfactory

3. Describe how the employee's efforts during the review period helped support their colleagues, the division's goals/direction, and the College's commitment to creating a more inclusive and welcoming experience for all:

4. Describe activities that could foster the employee's professional development. This could include learning activities, stretch assignments, or other experiences that could help the employee develop their skill level for their current position or skills and experience needed to help the employee reach long-term career goals

5. Supervisor Summary Comments and Rating

(Provide a summary evaluation and rating of the employee's performance this year)

SUPERVISOR SUMMARY COMMENTS:

Summary Rating

Place an "X" in the box that most closely approximates this person's overall performance during the review period.

RATING SCALE

<p>Significantly Exceed Expectations</p> <p><input type="checkbox"/></p>	<p>Performance far exceeds expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in a consistently superior overall quality of work. Performance includes the completion of a major goal or project or exceptional or unique contribution in support of department or college objectives. Demonstrates unique understanding of work beyond assigned area of responsibility, is exceptionally flexible to change and assists others in understanding change. Achievements and abilities are obvious to subordinates, peers and managers and other constituents; are recognized as an expert in their job area. Contributes to the College's success beyond job requirements. Achievement of this level of performance is rare.</p>
<p>Exceeds Expectations</p> <p><input type="checkbox"/></p>	<p>Performance consistently exceeds expectations in all essential areas of responsibility, and the quality of work overall is excellent. Regularly takes on more than is required and takes the initiative to obtain information or clarification of policies, procedures, and objectives. Anticipates issues and suggests and/or takes appropriate action. Employee meets and often exceeds annual goals and objectives. These employees are role models and often take initiative beyond daily job duties. They clearly understand the connection between job responsibilities and the impact their work has on areas of the College and are flexible in responding to changing conditions that may require adjustment. Achievement of this level of performance is infrequent.</p>
<p>Meets Expectations</p> <p><input type="checkbox"/></p>	<p>Performance consistently meets expectations in all essential areas of responsibility and, at times, possibly exceeds expectations. Overall, the quality of work is very good. The most critical annual goals are met and contributions to the department/team are positive and consistent. Performance is "on track", expectations are fully achieved and work is performed independently and competently. These employees also recognize, participate in, and adjust to changing situations and work.</p>
<p>Needs Improvement</p> <p><input type="checkbox"/></p>	<p>Performance does not consistently meet expectations and fails to meet expectations in one or more essential areas of responsibility and/or fails to complete one or more of the most critical goals. The need for improvement and development has been periodically communicated to the employee throughout the review period. Performance may negatively impact the work of other employees or work units.</p>
<p>Unsatisfactory</p> <p><input type="checkbox"/></p>	<p>The employee does not display competence in most aspects of their position or some critical aspects of the position. The employee requires frequent close supervision, and immediate, significant performance improvement is required.</p>

Job Description Review: Please review the employee's current job description, revise as appropriate, and submit a newly signed job description along with the performance appraisal. Please check the box that best describes the current status of the employee's job description.

_____ A signed job description is attached. The job description has been revised and no changes are necessary.

_____ A NEW, signed job description is attached. The job description has been revised/updated.

6. **2024-25 Key Objectives/Goals:** Provide a list of the top 3-5 major goals or objectives set for the employee for the 2024-25 year.

Reviewed By:

Date Reviewed:

Department Head Signature:

Reviewed By:

Date Reviewed:

Senior Leader (Vice President):

I have reviewed this Performance Evaluation with the Employee as of the date below.

Reviewed by: _____ Date Reviewed: _____

Supervisor Signature: _____

Please scan and email the completed, signed Performance Evaluation to hr@lafayette.edu.

EMPLOYEE COMMENTS: (Optional)

Employee's Signature: _____ Date: _____