The University of Scranton

Performance Management Program

Participant Manual

January 2012
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Objectives of Today’s In-Service

• Introduce staff, supervisors, and managers to the new Performance Management Program.
• Show how performance management is more than just performance appraisal.
• Identify how your ideas and input were utilized in designing the new program.
• Outline how the new process will be used in the future.
• Provide a few examples to get you started.

Background

• Human Resources, President’s Cabinet and Board of Trustees support for change.
• Survey of all staff and managers (February 2011) – over 200 responses were received.
• A Steering Group worked with Human Resources to design the new program, using your input.
Steering Group Members

Meg Cullen-Brown  Marise Garofalo
Tim Barrett       Barbara King
Thomas Cadugan    Lori Nidoh
Mark Carmody      Patricia Savitts
Patrick Donohue   Lynn Scramuzza
Joseph Dreisbach  Kathryn Yerkes

The last time I had a formal performance appraisal was:

- 50% within the past 12 months
- 23% within the past 24 months
- 9% within the past 3 years
- 11% not for over 3 years
- 8% never
The performance appraisal form that has been used for my annual appraisal is the following:

The current performance appraisal process' best features are (check all that apply):

[Bar chart showing the distribution of responses for the best features of the performance appraisal process.]
Periodic discussions about performance are an important part of the annual performance evaluation ...

The current staff performance appraisal system used by The University of Scranton is effective.
Slide 12
My position is classified as:

![Bar chart showing position classification]

Slide 13
In my current position, I supervise staff and sign their performance appraisals.

![Bar chart showing staff supervision and performance sign-offs]
I work in the following division or department of the University:

Segmenting the Survey Results

• Segmentation of the survey results did not show major differences in responses between:
  – Supervisory and non-supervisory employees;
  – Exempt and non-exempt employees;
  – People in different divisions of the University.
118 Narrative Comments

- Comments ranged widely; however, some common themes were:
  - Need for improved 2-way communications;
  - Recognize performance at higher levels;
  - Why does performance appraisal matter if everyone gets the same pay raise; “slackers” should not get the same raise.
  - Don’t just have “check the box” exercise; make it meaningful.
  - Develop goals related to the job;
  - Supervisors should receive training, and also be evaluated.
  - Keep it simple.

Goal of the Performance Management Program

The Goal of the Staff Performance Management Program is to provide a process to retain, develop, and reward talented staff; consistent with the Mission and Strategic Plan of The University of Scranton.
The Most Important Thing

• The most important thing is NOT the annual appraisal.
• The most important thing is the COMMUNICATION that occurs throughout the year, which is reflected in the annual appraisal.

Three guiding principles for the Performance Management Program:

1. Align all employees’ work and outcomes with the strategic plan and goals of the University, and the tactical plans of their divisions and departments. This is best visualized through the following model:
Three guiding principles for the Performance Management Program:

2. Encourage two-way communications about performance that are constructive, not adversarial; in a partnership between staff and supervisor.

Three guiding principles for the Performance Management Program:

3. Create a fair means to recognize high performers and address poor performance.
Staff Performance Management Program Cycle:

University Mission, Strategy & Tactical Plans

Goal Setting, Action Plan, Training Plan

Assess, Refine, Update Goals and Plans (Quarterly) with formal January mid-year review

Evaluation

Timeline for Performance Management Cycle – Year 1 (2011-12)

First Meeting (June 2011)
- Review Strategy, Plans, Unit Goals, Job Description;
- Set Goals or Projects for year;
- Training that is needed;
- Review expectations (look at form).

First Quarter (Fall 2011)
- Review progress on goals;
- Adjust goals as needed;
- Discuss issues related to performance.

Mid-Year (January 2012)
- Formal discussion;
- Review progress on goals;
- How are we doing?
- Confirmation of Review sent to HR.

Third Quarter (April 2012)
- Review progress on goals;
- Adjust goals as needed;
- Discuss issues related to performance.

End of Year (June/July 2012)
- Formal annual evaluation;
- Final status of goals;
- Set Goals or Projects for next year;
- Training that is needed in next year.
Three Part Performance Appraisal Form

**PART I:** Review of Key Duties and Responsibilities
(What you do.)

**PART II:** Projects or Goals that will be Accomplished during the Rating Period
(How and when it will be accomplished.)

**PART III:** Competencies Expected for Successful Performance
(How well you do it.)
The Goal of the Staff Performance Management Program is to *provide a process to retain, develop, and reward talented staff; consistent with the Mission and Strategic Plan of The University of Scranton.*

The guiding principles used in designing the Performance Management Program were the following:

1) Align all employees’ work and outcomes with the strategic plan and goals of the University, and the tactical plans of their divisions and departments. This is best visualized through the following model:

2) Encourage two-way communications about performance that are constructive, not adversarial; in a partnership between staff and supervisor.

3) Create a fair means to recognize high performers and address poor performance.
The Staff Performance Management Program Cycle consists of the following steps:

1. Review the University’s Mission, Vision, and Strategic Plan; and the unit’s Tactical Plan.
2. Review and/or update the individual’s job description, and develop a mutual understanding in writing by the supervisor and employee of the performance expectations for the position, including goals.
3. Determine and plan for the training and development that may be needed by the employee to be successful in this position; with a view towards furthering his/her ability to serve the university into the future.
4. Continuously assess, refine and update the performance plan and training plan, at least quarterly, **with a formal mid-year review in January.**
5. Final Evaluation (June-July): Evaluate the success of the individual compared to the plan.
Performance Appraisal Form
Updated June 2011

NAME: ___________________________________ DEPARTMENT: _______________________

PART I: Review of Key Duties and Responsibilities.

The reviewer and employee have discussed the key job duties and responsibilities. The attached job
description is (check one):

_____ Current as described, OR

_____ Updated to reflect current departmental needs and responsibilities (changes to be
coordinated with Human Resources)

PART II: Projects or Goals that will be Accomplished during the Rating Period:

The reviewer and employee will discuss and document at least two (2) projects or goals that will be
achieved during the rating period that relate to the expected performance of the individual and to the
unit’s goals. In addition, the reviewer and employee will discuss and document one (1) stretch goal that
will present a challenge designed to enhance the employee’s skills and knowledge, and make a
significant contribution to the department’s current or future needs.

The format to be used in establishing these goals is the following:

<table>
<thead>
<tr>
<th>What is the project or goal that will be achieved?</th>
<th>How will we measure that it has been accomplished?</th>
<th>What resources, including training, does employee need?</th>
<th>What timeframe is expected for project or goal achievement?</th>
</tr>
</thead>
</table>
| Results Commentary – 1st Update Period
  Employee                                       | Reviewer                                          |                                                       |                                                          |
| Results Commentary – 2nd Update Period
  Employee                                       | Reviewer                                          |                                                       |                                                          |
| Results Commentary – 3rd Update Period
  Employee                                       | Reviewer                                          |                                                       |                                                          |
| Results Commentary – Final Review
  Employee                                       | Reviewer                                          |                                                       |                                                          |
PART III: Competencies Expected for Successful Performance:

The competencies described in the following pages relate to the three Themes of The University of Scranton’s Strategic Plan:

1. **Cura Personalis**: A commitment to treating others, especially our students, as God treats us. The University and its employees will foster a work environment built on respect, trust, integrity, and ethical behavior. We will embrace the role of each individual in supporting our strategic, tactical and departmental goals, and develop the interpersonal relationships necessary to meet them.

2. **Magis**: Our restless desire for excellence grounded in gratitude. This theme directly challenges us to perform our duties and job responsibilities well.

3. **Rei Solicitude**: Caring for the gifts we have been given; our commitment to stewardship with regard to all the resources at our disposal, both capital and especially human. The conscientious management and cultivation of the resources within our care to support the well being of the broader University community.

4. **Supervisory and Managerial**: Competencies for employees who manage people.

The following ratings are to be used for each competency area:

**Unacceptable**: Performance did not improve in spite of prior notice

**Needs Improvement**: Sometimes acceptable but not consistent

**Meets**: Consistently meets requirements of the job

**Exceeds**: Clearly and consistently above what is required

**Star Performer**: Unique and exceptional accomplishments; consistently exceeds all expectations and serves as a role model.
1. **CURA PERSONALIS**: A commitment to treating others, especially our students, as God treats us. The University and its employees will foster a work environment built on respect, trust, integrity, and ethical behavior. We will embrace the role of each individual in supporting our strategic, tactical and departmental goals, and develop the interpersonal relationships necessary to meet them.

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<tr>
<th>Competency Area</th>
<th>Competency Description</th>
<th>Unacceptable</th>
<th>Needs Improvement</th>
<th>Meets</th>
<th>Exceeds</th>
<th>Star Performer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Positive Work Relationships</strong></td>
<td>Exhibits positive behavior when interacting with coworkers, administrators, students, visitors, and other members of the University community.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Collaboration and Teamwork</strong></td>
<td>Displays willingness to work cooperatively and collaboratively with others in a variety of work settings.</td>
<td></td>
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<tr>
<td><strong>Respect</strong></td>
<td>Respects individual differences and strengths in other employees. Demonstrates sensitivity to cultural and ethnic differences in all interactions. Treats others fairly and is responsive to the needs of others.</td>
<td></td>
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</tr>
<tr>
<td><strong>Professionalism</strong></td>
<td>Exhibits professional behaviors in the workplace. Models ethical behavior and personal accountability to others. Addresses opportunities and concerns with the appropriate individual in a professional manner. Offers and accepts constructive feedback from others and uses it to strengthen performance. Serves as a University ambassador in the community.</td>
<td></td>
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</tr>
<tr>
<td><strong>Interpersonal Skills</strong></td>
<td>Communicates and engages effectively, compassionately, and clearly with others. Actively listens to others to understand and respond to their needs. Engages others in two-way conversations to clarify expected outcomes. Uses tact and diplomacy in handling sensitive situations, and respects confidentiality.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Decision Making and Discernment</strong></td>
<td>Makes responsible and appropriate decisions, prioritizes needs, and takes action that is consistent with, enforces, and reflects the University’s Jesuit mission and identity. Seeks opportunities to provide input to decision making processes. Positively supports decisions once they are made.</td>
<td></td>
<td></td>
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</table>
2. **MAGIS**: Our restless desire for excellence grounded in gratitude. This theme directly challenges us to perform our duties and job responsibilities well.

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<tr>
<td><strong>Job Knowledge</strong></td>
<td>Demonstrates knowledge of relevant theories, policies, procedures and technologies required to perform job.</td>
</tr>
<tr>
<td><strong>Quality of Work</strong></td>
<td>Produces high quality work with focus on accuracy; attention to detail; completeness.</td>
</tr>
<tr>
<td><strong>Time Management</strong></td>
<td>Uses time wisely; demonstrates expected attendance; is punctual for meetings; is dependable and reliable.</td>
</tr>
<tr>
<td><strong>Initiative/Innovation</strong></td>
<td>Motivated to succeed; takes on new projects and assignments and delivers results in creative new ways; identifies ways to improve departmental results; problem solver.</td>
</tr>
<tr>
<td><strong>Professional Development</strong></td>
<td>Continuous desire and movement toward increasing personal and professional development; strives to achieve additional certifications (if possible); looks for ways to enhance effectiveness.</td>
</tr>
</tbody>
</table>
| **Communication**     | Ability to communicate effectively and clearly with others  
  - **Listening**: Understands and learns from what others say; gives the speaker undivided attention and appears interested in the message; allows others to speak without interrupting; asks clarifying questions to elicit more detailed information.  
  - **Speaking**: Articulates ideas in a clear, concise manner.  
  - **Reading Comprehension**: Grasps the meaning of written information; learns from written passages by discerning main ideas and/or facts; understands basic correspondence and/or instruction; draws logical conclusions from text.  
  - **Written/Writing**: Demonstrates understanding of and consistently uses proper grammar, spelling, sentence construction. |

Comments:
3. **REI SOLICITUDO (Stewardship):** Caring for the gifts we have been given; our commitment to stewardship with regard to all the resources at our disposal, both capital and especially human. The conscientious management and cultivation of the resources within our care to support the well being of the broader University community.

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<tr>
<td><strong>Quantity of Work</strong></td>
<td>Completes work within established time frames; performs a high volume of work with expected quality.</td>
</tr>
<tr>
<td><strong>Accountability</strong></td>
<td>Accepts responsibility and ownership for decisions, work outputs and performance outcomes; adheres to University policies, procedures, practices and regulations.</td>
</tr>
<tr>
<td><strong>Knowledge of University Resources</strong></td>
<td>Has a thorough understanding of University resources and how to use them to maximize job effectiveness. Shares this information with others.</td>
</tr>
<tr>
<td><strong>Adaptability</strong></td>
<td>Demonstrates ability to multitask and work effectively in a changing environment.</td>
</tr>
<tr>
<td><strong>Efficiency</strong></td>
<td>Seeks ways to improve the utilization of University resources. Is cost-effective and budget conscious.</td>
</tr>
</tbody>
</table>

Comments:
<table>
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</thead>
<tbody>
<tr>
<td><strong>Appraising Performance</strong></td>
<td>The ability to fairly, objectively, and routinely set goals, review performance and provide honest and constructive feedback.</td>
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<tr>
<td><strong>Conflict Management</strong></td>
<td>The ability to quickly deal with conflict, and select the best approach to address and reduce the conflict.</td>
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<tr>
<td><strong>Coaching</strong></td>
<td>The ability to provide instruction in a non-threatening manner; be a good role model, encourage development.</td>
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<tr>
<td><strong>Team Development</strong></td>
<td>The ability to build a group into a cohesive, focused, synergistic group aimed toward the accomplishment of set goals and objectives.</td>
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</tr>
<tr>
<td><strong>Project Management</strong></td>
<td>The ability to keep projects moving on schedule, stress the importance of deadlines and quality, and the efficient use of time.</td>
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</tr>
<tr>
<td><strong>Delegation</strong></td>
<td>The ability to give authority to another when appropriate, to solve problems, set goals, and establish the time frames.</td>
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</tr>
<tr>
<td><strong>Plan/Organize</strong></td>
<td>The ability to project upcoming needs, schedule appropriately, manage budget and other resources, and ensure that adequate tools, training, and support are available,</td>
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<tr>
<td><strong>Leadership</strong></td>
<td>The ability to model for others organizational commitment, enthusiasm, respect for diversity, quality work standards, persistence, and adaptation to needed change.</td>
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</tbody>
</table>
Summary

NOTE: A manager at least one level above the reviewer will discuss the final rating with the reviewer before it is discussed with the employee.

Overall Rating (Annual Review): ________________________

Reviewer’s Comments:

Recommended for Pay Increase: _____ Yes  _____ No

If one factor is Unacceptable and therefore, the overall rating is Unacceptable - pay raise cannot be given until performance meets requirements. The University of Scranton Administrators’ Conference will set guidelines regarding eligibility for a pay increase if the employee’s overall rating is Needs Improvement.

Signature of Reviewer: ________________________________  Date: __________________

Signature of Manager: ________________________________  Date: __________________

Employee Comments:

Employee Signature: ________________________________  Date: __________________

Ratings:
Unacceptable: Performance did not improve in spite of prior notice; one or more competencies or goals rated as unacceptable.
Needs Improvement: Sometimes acceptable but not consistent. For overall rating - acceptable in many areas, but some areas warrant improvement. If more than six competencies and/or goals are rated as Needs Improvement; overall rating must be Needs Improvement. However, if critical goals or competencies need improvement, manager may give overall rating of Needs Improvement even when fewer than six competencies or goals need improvement.
Meets: Consistently meets requirements of the job.
Exceeds: Clearly and consistently above what is required.
Star Performer: Unique and exceptional accomplishments; consistently exceeds all expectations and serves as a role model.
Timeline for Performance Management Cycle – Year 1 (2011-12)

First Meeting (June 2011)
- Review Strategy, Plans, Unit Goals, Job Description;
- Set Goals or Projects for year;
- Training that is needed;
- Review expectations (look at form).

First Quarter (Fall 2011)
- Review progress on goals;
- Adjust goals as needed;
- Discuss issues related to performance.

Mid-Year (January 2012)
- Formal discussion;
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- How are we doing?
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- Formal annual evaluation;
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Tips for Setting Goals/Projects

**Managers:**
What are my division’s key initiatives for this year? How do my objectives, as well as my team’s deliverables, link to these key initiatives?

**Employees:**
Use documented material on your job/role (job descriptions, procedures, etc.) to help you frame your objectives, to make certain you are aligned with the requirements of the job/role.

Use the **SMART** approach...
### Use the “SMART” Approach

- **S** Specific
  - Explain objective and how it needs to be achieved

- **M** Measurable
  - Define quantity, quality, timeliness and cost

- **A** Achievable
  - Challenging, but within reason

- **R** Relevant
  - Apply to the employee’s role

- **T** Timebound
  - State when objective needs to start and/or finish

### Timeline for Performance Management Cycle – Year 1 (2011-12)

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Tips for conducting a Mid-Year Review:

- Think of the Mid-Year Review as the **minimum requirement** for discussing performance and an opportunity to revisit career interests. **You should be having these discussions throughout the year.** And whether you are a manager or an employee, if you aren’t having enough of these discussions, ask for more.

- The Mid-Year Review is important for discussing and **taking action against obstacles or challenges**.

- Keep the discussion focused on performance against objectives. **It is not intended to be a discussion of actual performance ratings.**
Timeline for Performance Management Cycle – Year 1 (2011-12)

**First Meeting (June 2011)**
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- Training that is needed in next year.
Sample Self-Assessment

• The employee’s views are critical to ensuring a two-way shared process.

• How did you contribute to the success of your department, and to the University’s success?

• Ensure that the review covers your work over the past year, as well as things you need assistance doing.
Annual Performance Review: Employee Self-Assessment Form

Note to Supervisors and Employees: This is a list of suggested reflection questions. It may be shortened or modified for use in your department. What is important is that the employee provide some information regarding his/her performance prior to or during the annual review.

Employee Name:____________________________  Date:________________

Department Name:______________________

1. After reviewing your job responsibilities, describe how you fulfilled the expectations of your job.

2. How did my performance contribute to my department’s achievement of our strategic and tactical goals?

3. Did I accomplish goals that were set for me during my last performance review? (Please be specific.)

4. What were the actions or factors that inhibited my performance?

5. The new skills I developed and demonstrated are:

6. How did these skills add value to my department or the University?

7. Identify any ideas that could improve your job, work area, or department.

8. How can my supervisor facilitate my contribution to the achievement of our goals?

9. My goals for next year are:
Slide 35

**Best Practice: Face-to-face discussions to gather information for the Annual Review**

Slide 36

**Recommended Agenda for Annual Review Meeting**

**Begin by reviewing what will be covered in the meeting:**
- a look back at last year's performance (including the employee's self-assessment).
- a look ahead to the coming year, and
- a discussion about development objectives and career interests.

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**Recommended Agenda for Annual Review Meeting**

**Continue by summarizing the past year's performance:**
- Discuss performance, focusing on specific results and aspects of the performance.
- Review the ratings, linking them to the summary comments and performance against objectives.
- Ask the employee if he/she wishes to comment, and ask him/her to sign the form to indicate the form was received.
Recommended Agenda for Annual Review Meeting

Conclude by focusing on the coming year:

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**Timeframe**

- **May/June 2011**: In-services for all departments
- **June 2011**: Initial meeting of supervisors and staff to develop goals, IDP’s, and review new program for each individual
- **Fall 2011**: Quarterly meeting
- **January 2012**: Formal mid-year review
- **April 2012**: Quarterly meeting
- **June/July 2012**: Annual Review
Contact Persons

• Patricia Day, Vice President for Human Resources
  – (570) 941-7767
  – patricia.day@scranton.edu
Performace Management Steering Group 2011

Meg Cullen-Brown, Co-chair  Assistant Dean, CGCE

Timothy Barrett  Supervisor, Electrical and Maintenance
Mark Carmody  Assistant Plant Director – Student Housing
Patrick Donohue  Assistant Vice President for Budget and Financial Planning
Barbara King  Director – Residence Life
Thomas Cadugan  Assistant Director, Public Safety
Lori Nidoh  Director of Marketing
Joseph Dreisbach  Associate Provost
Lynn Scramuzza  Faculty Secretary, English and Theatre
Patricia Savitts  Supervisor, Library Circulation/Acc. Serv.
Marise Garofalo  Assistant Vice President for Development
Kathryn Yerkes  Director of Planning
More SMART Details

Specific: states a clear end result. The objective names the end result, output or intent so there is no room for misinterpretation. Use concise verbs, such as “to establish,” “to increase,” or “to reduce” when writing objectives.

Measurable: is measurable and quantifiable. The objective should describe the number, percentage, quantity, tolerances or variances that are acceptable. Some general categories and examples associated with measuring objectives include:

- **Quantity**: number of units produced, items processed, calls taken, contacts made, etc.
- **Quality**: percentage error rates, number of complaints received, accuracy of reports, etc.
- **Cost**: dollars spent, percentage within budget, dollars spent on overtime, etc.
- **Time in Use**: percentage of target dates met, number of deadlines met, etc.

Attainable: there is a reasonable chance that the objective can be achieved; some people suggest an 80% probability is effective as a motivator.

Relevant: related directly to the individual’s sphere of influence and key job accountabilities.

Timebound: states a time frame, target dates, and/or milestones during the year which are expected to be met.

---

### What is the project or goal that will be achieved?

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<td>Results Commentary – 1st Update Period</td>
<td></td>
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