

# PERFORMANCE DEVELOPMENT AND GOAL SETTING – 2025 PRIMER



FOR SUPERVISORS OF STAFF EMPLOYEES



# PERFORMANCE DEVELOPMENT OBJECTIVES

- ☐ Create alignment and focus on annual goals for the upcoming year
- ☐ Reinforce the desired culture of the University through feedback on the Fisher Competencies and achievement of goals in the performance cycle
- ☐ Support open discussion and feedback to enable employees to contribute to their fullest
- ☐ Determine eligibility for a pay increase effective September 1<sup>st</sup> 2025

# DEVELOPMENT TIMELINE & PROCESS

- ❑ **May 12 through June 30:** Supervisors and employees should complete the following actions:
  - Employee starts process by commenting on results against objectives and demonstration of Fisher competencies
  - Supervisor schedules time with each direct report to provide feedback on development in the past year, indicate eligibility for a performance increase, and to determine goals for the upcoming cycle (June 1, 2025 -May 31, 2026).
  - At the meeting, the supervisor and employee **discuss and finalize upcoming goals.**
  - Employee acknowledges conversation with supervisor in the form.
  - Supervisor sends final document (including upcoming fiscal year goals) to [humanresources@sjf.edu](mailto:humanresources@sjf.edu).
  - Please note: There is no differentiated rating component in the 2024-25 performance period. All employees who meet expectations will be eligible for an increase.

# PART A – DISCUSS ANNUAL PERFORMANCE/FISHER COMPETENCIES

- Discuss Development over the last year incorporating the Fisher Competencies (plan for a 30-45 minute discussion)



## ST. JOHN FISHER UNIVERSITY ANNUAL REVIEW AND GOAL SETTING

Employee Name: [Click here to enter text.](#)

Job Title: [Click here to enter text.](#)

Supervisor Name [Click here to enter text.](#)

Review Period: June 2024-May 2025

### Part A: Discuss Annual Performance/Fisher Competencies

*Demonstration of the Fisher Competencies is expected by all employees. Insert commentary and have a discussion on the degree to which each competency was displayed during the performance period, and the impact to Fisher as a result.*

**Student-Centered/Customer Service Focused:** Responds to student and customer requests for information and services promptly, courteously, sensitively, and effectively. Demonstrates a commitment to improving and supporting the student and customer experience. [Employee comment](#)

**Student-Centered/Customer Service Focused:** [Supervisor Feedback](#)

**Collegial:** Encourages and demonstrates teambuilding, collaboration, and inclusion. Fosters positive relationships by treating others with respect; speaks honestly and listens carefully. Conveys ideas clearly to promote understanding. Deals with conflict appropriately and in a professional manner. Displays foundational Fisher values. [Employee comment](#)

# FISHER COMPETENCIES

- ☐ **Student-Centered/Customer Service Focused**
- ☐ **Collegial (teamwork; collaboration, inclusion)**
- ☐ **Accountable**
- ☐ **Job Knowledge and Technical Ability**
- ☐ **Culture of Belonging**
- ☐ **Supervisory Skills (as appropriate)**

# PART B – 2023-24 GOAL ACHIEVEMENT

- Discuss Goal Achievement leveraging the goals established at the outset of the performance cycle

## Part B: Evaluation of Goals

*Insert established 2024-25 Goals, along with commentary on the degree to which they have been achieved.*

**Goal:** [Click here to enter text.](#)

**Goal:** [Click here to enter text.](#)

**Goal:** [Click here to enter text.](#)

**Goal:** [Click here to enter text.](#)

*Copy/paste additional goals as needed*

# PART C – EMPLOYEE CONFIRMATION

- After the development discussion concludes, the supervisor asks the employee to sign and date the form.
- The employee's signature confirms a discussion occurred. It does not indicate agreement or disagreement.
- **After signing the form, the supervisor scans** and sends to [humanresources@sjf.edu](mailto:humanresources@sjf.edu) for tracking and filing

## Part C: Final 2024-25 Assessment\*

*Supervisors, please indicate whether the employee has met expectations for the performance period*

Meets Expectations – eligible for compensation increase: Yes/No

*\*No increases will be issued absent a completed performance review*

## Confirmation

*Employee: I have had an opportunity to have a development discussion with my supervisor.*

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Signature and Date

# PART D – GOAL SETTING FOR FY-25/26

- Simplified goal documentation
- Goals are Outcome focused!
  - See **Development and Goal Setting Process Guide** for sample goals and more on goal setting
- Goals derived from:
  - Job Description/Responsibilities
  - Department Goals
  - University Strategic Plan
- Goal setting should be a collaborative process considering ideas from the employee and supervisor - **final goals are mutually agreed**

## Part D: Establishment of New Goals

*Keep this portion for your records. Goals will be evaluated at the end of the performance period*

**Employee Name:** Click here to enter text.  
**Supervisor Name:** Click here to enter text.

**Job Title:** Click here to enter text.  
**Goal Period:** 2025-2026

*Document the employee's goals for 2025-2026. Goals may be derived from job responsibilities, department goals, and/or the University Strategic Plan.*

**Goal:** Click here to enter text.

**Goal:** Click here to enter text.

**Goal:** Click here to enter text.

**Goal:** Click here to enter text.

*Copy/paste additional goals as needed*



## ESTABLISHING GOALS (CONTINUED)

- ☐ No set number of goals required
- ☐ Each employee is required to have a goal focused on Professional Development required for success in their current role.
  - Pro-Tip: Use Linked In Learning to assign training – available on the LinkedIn Learning Launchpad
- ☐ Some goals may be so integral to the position that they are **appropriate to repeat each year.**
- ☐ Goals should cover primary outcomes expected for the fiscal year
  - Multi-year projects identify the outcomes for this year
- ☐ Goals do not need to be documented in priority order

## TRACKING PROGRESS (ONGOING)

- ☐ Goals can and should be modified/added/cancelled during the year due to **changing department priorities**
- ☐ Use Part D portion of form during 1:1 meetings throughout the year to discuss goal status
  - Mid-year check-in is especially important if not discussed in 1:1 meetings

QUESTIONS? CONTACT VALERIE BENJAMIN (VBENJAMIN@SJF.EDU)

