

A photograph of the College of the Holy Cross campus. On the left is a large, multi-story brick building with a prominent ivy-covered wall and a white portico with columns. The building has several gables and a central tower with a pointed roof. In the foreground, a wide, paved walkway crosses a green lawn. To the right, there are more trees and a smaller building in the distance. The sky is filled with soft, golden light, suggesting a sunset or sunrise.

COLLEGE OF THE
HOLY CROSS

Performance Evaluation Guide - 2022 -

FOR STAFF & SUPERVISORS

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College of the Holy Cross

Performance Evaluation Guidelines

The performance review for salaried and hourly paid employees is part of the College's Performance Development Program. These guidelines apply to both categories of employees. **This year's review begins Monday, March 14, 2022 and should be completed by Monday, May 16, 2022.**

The period of performance to be reviewed is from February 2021 through March 2022. The performance review should be a *developmental* exercise. Holy Cross managers are expected to help employees perform their best work and find satisfaction, reward, and purpose in their jobs. The performance evaluation process is a critical tool to accomplish this.

Important Update regarding the 2022 Review Forms: The College is currently assessing and making enhancements to our Performance Development Program. For the 2022 review period, **there will be two standardized forms utilized across all divisions**, one for non-exempt and one for exempt employees. In addition to the two performance review forms, a universal self-reflection form will also be provided and **it is required for all employees to complete**. Managers must attach the employee's self-reflection to the employee's performance review *prior* to its submission. [HR Performance Program Development Forms](#) are available on the HR Website.

Overview: Performance Development 2021-2022 Review Period

Date	Event
March 14	Official review process begins with the release of the new performance review forms, guidelines and toolkits.
April 1	Employee self-reflection due to manager. Manager evaluation due to staff member. Meetings take place after that exchange.
May 16	Performance evaluations must be submitted/uploaded to HR with signatures.

Manager Responsibilities:

Timing	Responsibility	Complete?
Late March	Provide employee with their job description, performance review form, and self-reflection form. Schedule a time in early April for Initial Review Meeting.	
Early April	Prepare for Initial Review Meeting: Review employee's self-reflection, and create an outline of the employee's performance review to share.	
Early April	Meet with the employee to discuss the new performance review form and go over their self-reflection. Begin discussing SMART goals for upcoming year. Schedule a follow-up Formal Review Meeting to take place during late April.	
Late April	Hold the Formal Review Meeting with the employee for discussion and signature. Provide the opportunity for the employee to add final comments.	
Early May	Submit the final review to Human Resources via this google form . Provide a final copy of the form to the employee at well. Contact HR if there are alterations to the employee's job description.	

Employee Responsibilities:

Timing	Responsibility	Complete?
Late March	Complete the required employee self-reflection form and submit it to your manager no later than April 1. Prepare for Initial Review Meeting.	
Early April	Meet with your manager to discuss the performance documents and your self-reflection. Review last year's goals and consider SMART goals for next year.	
Late April	Meet with your manager for your final performance review and add your final comments. Sign performance review document to complete the process.	

Detailed Timeline

March 14-April 1, 2022

Manager:

- Provide employee with their job description and distribute new performance review form (appropriately exempt or non-exempt) and required self-reflection form.
- Share any other relevant documentation – e.g. feedback received concerning the employee during the year, recognitions, records of counseling or discipline, etc.
- Ask the employee to send their self-Reflection no later than April 1.
- Answer any questions employees have regarding the materials provided to them in the week prior.
- Schedule a time to meet with the employee in early April for an Initial Review Meeting.

Employee:

- Review the above documentation.
- Begin working on your self-reflection form.
- Complete the required employee self-reflection form and submit it to your manager no later than April 1.

April 1-April 15, 2022

Manager:

- Review employee's self-reflection.
- For Initial Review Meeting: create an outline of the employee's performance review to share with the employee, including assessing last year's performance goals.
- Meet with the employee to discuss the new performance review form and go over their self-reflection.
- Begin discussing initial thoughts on the employee's evaluation regarding their major responsibilities and competencies.
- Collaborate with the employee to establish the new SMART goals they want to set for the upcoming year.
- Schedule a Formal Review Meeting to take place during late April.

Employee:

- Meet with the manager to discuss the performance documentation and your self-reflection.
- Review last year's goals and provide updates.
- Collaborate with the manager and establish SMART goals for the upcoming year.
- Make note of any new responsibilities or tasks you have assumed during the past year.

April 15-May 16, 2022

Manager:

- Hold the Formal Review Meeting with the employee for discussion and signature.
- Provide the opportunity for the employee to add final comments.
- Submit the final review to Human Resources via [this google form](#).
- Provide a final copy of the form to the employee at well.
- If there were any alterations to the employee's job description that were identified, please contact HR to discuss this process further.

Employee:

- Sign final performance review **and add your final comments**. *Please note:* The Employee's signature acknowledges that this performance review was discussed with their supervisor but does not necessarily indicate agreement with the assessments made therein.
- File the performance review in your personal records to refer to throughout the year and at next year's review.

College of the Holy Cross

Performance Review Ratings and Relevant Training Opportunities

Supervisors will be asked to use the rating scale below when assessing an employee's performance in relation to the College's core competencies and their major responsibilities. While guidance is provided below on the description for each category, it is critical that supervisors utilize the comment section and provide specific examples that support their ratings on the employee's development in the specific area they are assessing. Providing detail to support their responses will allow employees to better understand where their strengths are and where they have areas with the opportunity to improve. This can help guide future performance goals and identify development opportunities that supervisors can support their employee with throughout the next review period.

Rating Definitions:

- 5 - Outstanding** - This grouping is for the highest performers who consistently exceed performance expectations
- 4 - Exceeds Expectations** - This grouping is for superior performers who always meet and often exceed performance expectations
- 3 - Meets Expectations** - This grouping is for good performers who consistently meet (and may occasionally exceed) performance standards
- 2 - Needs Improvement** - This grouping is for employees who have difficulty consistently meeting performance expectations; for these employees the supervisor must manage their development and performance more closely
- 1 - Unsatisfactory** - This grouping is for employees who do not meet performance expectations; contact HR for advice on a formal performance improvement plan and/or disciplinary measures

WORKFORCE DEVELOPMENT



COLLEGE OF THE
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Office of
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The College of the Holy Cross strives to embody the principle of cura personalis, the Latin phrase meaning care for the whole person in which the Jesuit tradition is rooted. We are proud to offer a variety of trainings that support our employees across many aspects of life and work. Below are the trainings particularly focused on performance management. Please refer to our Winter/Spring 2022 Training Brochure for more opportunities offered through Human Resources.

Performance Management

Target Audience: Managers

Facilitator: Cally Ritter

Performance management and the performance evaluation process are critical to promoting an employee's growth and development. At times, honest, direct communication about an employee's performance can be challenging. In this seminar, we'll explore the performance appraisal process in depth, reviewing goal settings, effective feedback, and competency development. In addition, we will discuss how to deliver level-setting feedback without triggering defensiveness and how to communicate feedback that employee's may find hard to hear.

Offerings – Virtual

3/23/22	3/24/22	3/30/22	3/31/22	4/5/22
10am-11:30am	1pm-2:30pm	1pm-2:30pm	10am-11:30am	10am-11:30am

College of the Holy Cross

Core Competencies Guide

Holy Cross is committed to the growth and development of each staff member, and places high value on the performance evaluation conversation and process in order to support our employees. Throughout this process, supervisors and employees will be asked to link employee performance to our institutional mission and values as reflected in the Jesuit tradition.

To assist you with this process, as well as with discussing performance throughout the year, performance attributes or competencies, are provided below. They provide examples on what effective performance looks like at Holy Cross and **supervisors will be asked to comment on the employees' strengths, as well as identify areas in need of improvement, as they relate to these competencies.** Employees will also be asked to reflect on their own performance in relation to these competencies.

In order to effectively complete the performance evaluation process, please use this time to reflect on the [mission of the College](#), as well as familiarize yourself with some of the key behaviors that relate to each of the competencies.

Inclusion	The extent to which each person in an organization feels welcomed, respected, supported and valued as a team member. Inclusion is a two-way accountability; each person must grant and accept inclusion from others
<p>Key Behaviors:</p> <ul style="list-style-type: none">• Taking part in activities that build community and create a campus culture of freedom, mutual respect and civility• Actively seeking engagement with diverse individuals and perspectives• Respecting differences, demonstrating an openness to new ideas, and seeking to understand others' cultures and backgrounds• Treating others with dignity and examining their own biases and behaviors to help promote an environment that values diversity• Identifying and mitigating bias on personal, institutional, and process levels• Utilizing DEI training opportunities, serving as a Mission & Diversity Ambassador or HCFirst Mentor, participating in an employee affinity group, or joining an employee volunteer/service project	

Commitment	The level of enthusiasm and effort an employee dedicates to their work activities to achieve a high quality of work
<p>Key Behaviors:</p> <ul style="list-style-type: none">• Committing to making the best of their talents at work by strengthening existing talents or developing new ones• Striving for excellence in all aspects of their work and as a member of the community• Conducting their responsibilities following departmental policy and procedures with the appropriate judgment and technical skills. This includes prioritizing health and safety procedures• Meeting production goals and deadlines while maintaining the highest quality possible• Improving procedures and systems to streamline processes• Demonstrating <i>interpersonal skills</i> such as listening, being a team player, cooperating, collaborating, etc.; <i>business skills</i> such as project management, customer service, making presentations, public speaking, etc.; and <i>personal traits</i> such as honesty, integrity, diligence, intentionality, etc.• Working effectively when not under direct supervision or guidance	

Responsibility	Taking ownership of one's actions; Being accountable for the tasks and duties you are expected to perform
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Reaching sound decisions and exercising good judgment based on balanced consideration of facts, priorities, and alternatives • Committing to doing work of the highest quality and understanding how their job supports their department and impacts the College as a whole • Keeping the work area and work in general neat, clean, and organized. • Seeking improvement and efficiencies through the use of creativity and innovation • Accepting accountability for job performance and results • Being a good steward of College resources • Managing risks and reducing losses 	

Customer-Focus	Placing the needs and satisfaction of internal and external customers as a main priority
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Understanding & satisfying the needs of customers and clients, educating them as necessary • Demonstrating a willingness and openness to work with others to respond to customer needs and concerns in a timely manner • Fostering collaborative relationships built on mutual respect and understanding • Valuing customer feedback and finding ways to improve services • Demonstrating personal and professional care toward others • Being a highly effective communicator (both written and verbal communications) 	

Teamwork	Having a willingness to work collaboratively with others toward a common goal
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Working effectively and cooperatively with others across campus environments • Functioning as a team player and promoting group cooperation and participation • Respecting group goals by balancing their own responsibilities with the interest of the team and/or department • Sharing their knowledge, responsibilities and expertise with others easily and frequently • Valuing and including others in regard to team decisions and actions • Promoting an inclusive environment for all members of the College community 	

Communication	Exchanging information, ideas, thoughts and feelings with others (both verbally and non-verbally)
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Using communication tools effectively (verbal, presentation, written) to meet the needs of the particular audience or situation • Sharing information clearly and in a timely manner 	

- Demonstrating awareness and sensitivity to the needs of others while sharing information
- Encouraging the expression of diverse ideas and opinions
- Articulating thoughts in a polite and respectful manner
- Actively listening and engaging with others to enhance relationships across the organization

Professionalism	The conduct, actions and characteristics that demonstrate an employee’s ability to be a hardworking, dependable, and respectful member of the organization
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Accepting responsibility and taking ownership of all aspects of the job and taking accountability for good and bad outcomes • Taking ownership for their own self-development and continuous learning of new skills and best practices • Conducting oneself appropriately while holding others accountable to the same expectation • Embracing new challenges, adapting well to new situations and changing work responsibilities • Being open to suggestions and feedback, and utilizing the input from others • Displaying interest in and enthusiasm for the job and continually demonstrating commitment, cooperation, and positive behavior 	

Supervisory Competencies

Employee Development	The commitment and initiatives of the manager to help their employees be successful in achieving goals and grow professionally
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Assuming responsibility for the development of the employees who report to them, helping them to make the best of their talents and realize their full potential • Giving effective feedback and participating fully in the performance management process • Engaging their employees, taking the time to understand their wishes and aspirations and objectively assessing their capabilities • Supporting training and professional development opportunities to help employees grow their skill set, especially in areas relating to the mission of the College • Resolving conflicts effectively and respectfully, acting as sounding board for problem-solving • Handling challenging conversations with professionalism and dignity 	

Team Management	Overseeing the success of your employees, helping to allocate resources appropriately and support the accomplishment of common goals
<p>Key Behaviors:</p> <ul style="list-style-type: none"> • Engaging regularly with employees to build rapport and trust • Understanding what motivates and drives individual employees • Setting clear expectations and allocating resources appropriately • Recognizing and rewarding exemplary performance • Making consistent and fair business decisions • Practicing “active listening” - asking questions to clarify understanding and intent instead of making assumptions • Giving individualized attention to employees and using encouragement, praise, direction and correction, as the situation requires • Understanding the appropriate times to provide direction, coaching, or mentoring. 	

College of the Holy Cross

Goal Setting Guide

Holy Cross is committed to the growth and development of each staff member, and places high value on the performance evaluation conversation and process in order to support our employees. Supervisors are responsible for supporting the growth and development of their employees. Throughout this process, supervisors and employees will be asked to collaborate with one another to establish goals for an employee's own personal development that relates directly to the larger department, division, or College-wide goals. Employees will also be asked to reflect upon the goals set during the previous performance evaluation so progress toward those goals can be assessed.

Goal setting promotes the development and application of the talents of each individual within a diverse workforce. This promotes a continuous dialogue regarding an employee's performance between a supervisor and their employees. In doing so, employees can focus on developing new skills and knowledge that contribute to their own professional growth as well as support larger departmental/College needs. Employees should incorporate into their goals the specific performance attributes and competencies as informed by the College's Jesuit tradition.

Guidelines

- Assess the progress on goals established in the previous review period.
- New goals should relate directly to the larger department/division or College goals.
- Limit the number of goals (approx. 3) so that focused action can be taken.
- Ensure goals meet SMART goal criteria.

Establishing SMART Goals

Goals should be Specific, Measurable, Achievable, Relevant, and Time-bound. Goals may relate to the enhancement of specific duties on the employee's job description or to specific projects that will be taking place within the next review year. Behavioral goals specifically relating to the College's core competencies may also be established during this time.

