



COLLEGE OF THE
Holy Cross



PERFORMANCE MANAGEMENT GUIDE 2023

WORKFORCE DEVELOPMENT
OFFICE OF HUMAN RESOURCES

OVERVIEW

The 2023 performance evaluation period begins March 6 and ends May 15.

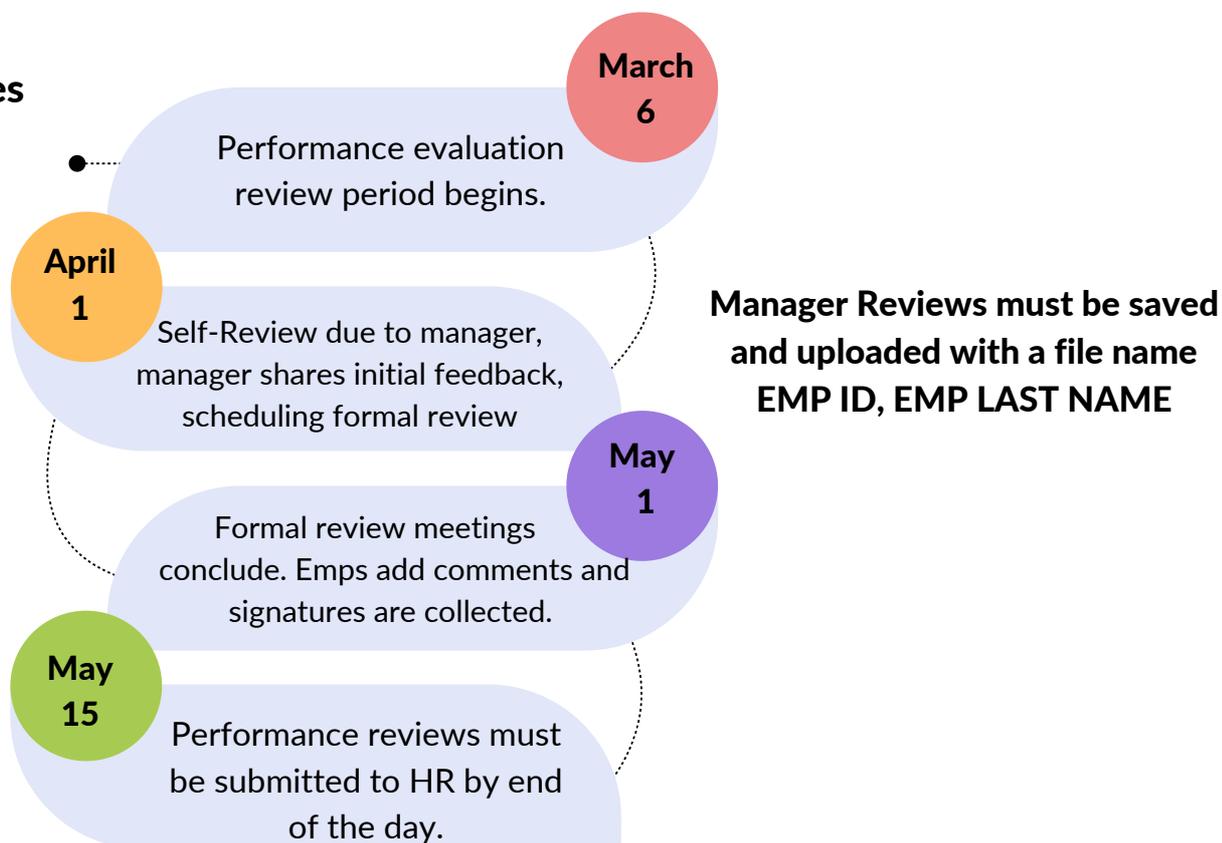
Holy Cross is committed to the growth and development of each staff member and places high value on the performance evaluation conversation and process in order to support our employees. The performance review for salaried and hourly paid employees is part of the College's Performance Development Program. These resources provided in this guide can be used by both hourly and salaried employees and managers.

The period of performance to be reviewed is from **March 2022 through February 2023**. 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 critical tool to accomplish this.

Getting Started

1. Employee Job Position Description. Contact WorkforceDevelopment@holycross.edu for copies of the employee's job description.
2. Updated 2023 Performance Review Forms
3. Performance Evaluation Guide

Important Dates



NONEXEMPT REVIEW RATINGS



Managers of non-exempt/hourly employees can utilize the guidance below to assess their employee's performance. It is critical that managers utilize comments 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 managers can support their employee with throughout the next review period.

Overall Rating

- 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 manager 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.

Core Competencies

- 3 – Advanced:** Able to demonstrate the competency with regularity in complex situations and with a variety of stakeholders. Ability to demonstrate competency independently and to lead others in this capacity. Adept at developing others/mentoring in relation to this competency.
- 2 – Proficient:** Able to demonstrate the competency in most circumstances and with regularity. Comfort with utilizing the competency in complex situations and with a variety of stakeholders. Ability to demonstrate competency more independently/with less supervision. Actively working on developing others/mentoring in relation to this competency.
- 1 – Developing:** Actively working on increasing ability and effectiveness, able to demonstrate the competency in certain circumstances and with increasing regularity. Increasing comfort with utilizing the competency in complex situations and with a variety of stakeholders. Ability to demonstrate competency improved through close supervision.

CORE COMPETENCY GUIDE

What are competencies?

Competencies are the skills, behaviors, and attributes an employee has to perform their job, explaining the "how" behind the way an employee approaches their goals and responsibilities. The identified core competencies below are our organization-wide competencies that link employee performance to our institutional mission and values as reflected in our Jesuit, Catholic tradition.

Why are they important?

While we all have different jobs, goals, and major responsibilities, core competencies unify our workforce with common values that support how we approach our work. They provide examples of what effective performance looks like here at Holy Cross. As we work toward the shared goals in the College's strategic plan, competencies help guide us in becoming a world-class workforce founded on inclusive excellence. Learn more on page six about the six pillars of Aspire.

Competency	Key Behaviors
<p>Collaboration: Enhancing information, ideas, thoughts and feelings thoughtfully with others in a manner that is proactive and enhances partnerships.</p>	<ul style="list-style-type: none"> • Working effectively in a team and promoting group cooperation and participation • Valuing and including others in decision-making • Sharing your knowledge and expertise • Actively listening and trust-building
<p>Inclusion: Actively engaging with the values of the College by promoting a work environment that embraces diversity and demonstrating respect for the opinions and beliefs of others</p>	<ul style="list-style-type: none"> • Taking part in activities that build community and foster a culture of mutual respect • Identifying and mitigating bias on a personal, institutional, and systemic level • Seeking diverse perspectives and ideas
<p>Innovation: Performing one's job with creativity and proactivity, improving procedures and problem-solving</p>	<ul style="list-style-type: none"> • Using critical and strategic thinking to create new ideas and improve processes • Engaging in continuous learning/development • Welcoming diverse and creative ideas • Being flexible and adaptable
<p>Mission/Service Orientation: Focusing on service to others and contributing to the College's collective mission</p>	<ul style="list-style-type: none"> • Building relationships and engaging with stakeholders • Demonstrating personal and professional care and mutual respect toward others • Seeking and responding to feedback
<p>Responsibility: Taking ownership of one's actions and accountability for one's tasks and duties</p>	<ul style="list-style-type: none"> • Committing to doing work of the highest quality • Recognizing how one's work impacts their team and the College as a whole • Being dependable and following through on commitments

Manager Competency	Key Behaviors
<p>Employee Development: The commitment and initiatives of the manager to help their employees be successful in achieving goals and grow professionally</p>	<ul style="list-style-type: none"> • Helping employees make the best of their talents and recognize their full potential • Giving effective feedback and engaging thoughtful in performance management • Supporting/providing training opportunities
<p>Team Management: The manager's ability to oversee the success their employees, helping to allocate resources appropriately and support the accomplishment of common goals</p>	<ul style="list-style-type: none"> • Regularly engaging and communicating with employees to build trust and rapport • Understanding what motivates and drives each employee • Setting clear and equitable expectations

GOAL SETTING FOR EXEMPT EMPLOYEES

Goal setting promotes the development and application of the talents of each individual and a continuous dialogue regarding an employee's performance with their manager. 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.

Guidelines

- Assess the progress on goals established in the previous review period.
- Establish mutually agreeable goals (approximately three) for the employee to focus on during the next year.
- Goals should be connected to larger departmental/College goals and initiatives as it relates to the employee's specific job responsibilities.
- Identify which areas of the College's Aspire strategic plan will be impacted by the goals that are established.
- Ensure goals meet SMART goal criteria. Goals should help employees develop professionally.



EXEMPT GOAL SETTING EVALUATION

Performance Goal Ratings

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EMPLOYEE TRAINING RESOURCES

Additional resources to help guide employees and managers (non-exempt and exempt) through this process are available to you through live training sessions and online resources. Registration for live sessions and access to online resources can be found online at Human Resources > Learning & Engagement > Performance Management or by using the QR code below.

Live Performance Management Training Sessions

Employees and managers can join on one of the following dates to learn more about best practices surrounding performance management. This training will help build skills surrounding giving and receiving feedback, goal setting, and provide specific information on our specific performance review process and expectations.

- March 20, 11am-12pm, Zoom - [Register Here](#)
- March 23, 3pm-4pm, Zoom - [Register Here](#)
- April 6, 11am-12pm, In-Person - [Register Here](#)

Online Performance Management Resources and training registration can be accessed [here](#).

Online Resources

These resources include curated LinkedIn Learning videos and performance management trainings offered by Cally Ritter.

STRATEGIC AREAS OF FOCUS

This February, President Rougeau launched "Aspire: Our Strategic Vision for a Hope-Filled Future," which articulates a set of strategic priorities that will guide and inspire our work together in service of the College's mission. Below, Aspire's six overarching pillars will help to guide our work and focus our goals as we work to create our shared future.

I. ACADEMIC POWERHOUSE - Offer a liberal arts education that is among the finest in the world and be recognized broadly for doing so.

II. TRANSFORMATIONAL STUDENT EXPERIENCE - Provide and promote a transformational, residentially based student experience rooted in Jesuit, Catholic formation.

III. INCLUSIVE EXCELLENCE - Commit campus-wide to an inclusive excellence framework in furtherance of our mission.

IV. IN AND OF WORCESTER - Embrace and promote the world of opportunity in our backyard and be an active partner in the City of Worcester's continued success, growth, and revitalization.

V. WORLD-CLASS WORKFORCE - Attract, support, and retain a best-in-class workforce that will develop and sustain best practices and policies that support the College's overall excellence.

VI. CULTURE OF PHILANTHROPY - Reimagine our approach to philanthropy and engagement to support Holy Cross' sustained vibrancy and strength today and tomorrow.



THIS STRATEGIC PLAN ENVISIONS A BOLD FUTURE FOR HOLY CROSS. STUDENTS, FACULTY, STAFF MEMBERS AND ALUMNI ALIKE HAVE CONTRIBUTED TO ITS VISION AND WILL BE KEY TO ITS SUCCESS.

EMPLOYEE CHECKLIST

Timeline	Employee Checklist	Completed?
Mid-March	Review your JPD and the competency guide to prepare for your self-review. Submit your self-review to your manager by April 1.	
Mid-April	Meet with your manager at the scheduled time for your initial conversation and discuss your self-review and collaborate on an outline for your formal review.	
Early May	Attend your formal review meeting with your manager and add any additional comments to the document as you see fit. Sign your document to confirm you participated in the performance review process.	

MANAGER CHECKLIST

Timeline	Manager Checklist	Completed?
Mid-March	Provide employee with their JPD and PR forms and give April 1 self-review deadline. Schedule initial review/check-in for early April.	
Mid-April	Review employee self-reflection and create an outline of employee's performance review. Hold initial meeting/check-in to review these with the employee and for exempt employees, review and establish SMART goals. Schedule final review meeting.	
Early May	Hold formal review meeting with employee for discussion and provide the opportunity time to add comments and then sign. Submit the review to HR no later than May 15 via this Google Form . Provide a copy to the employee and contact HR with any alterations to the employee's job description.	

Important Upload Notice

Files must be submitted to the Google Form with the employee's HCID number and last name separated by a common.

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