Performance Management Training for PSA and Non-Aligned

Department of Human Resources
June 2024

FY24
Non-Aligned Performance Management Application

Application Capability

- Two supervisor routing and input
- Print friendly capability
- Copy and paste functionality from word document
- Unlimited character limit, per dialogue box
- Error message details
- 120 minute time-out limit
- Return for correction, with explanation
- Can enter up to 10 goals/accomplishments
- Can access remotely, using VPN

New: Preferred Name & AutoSave

Accessing the PSA and Non-Aligned Performance Management Applications

MyNJIT login> Performance & Training Card> Performance Management - PSA Staff, Non-Aligned

Instructions

To complete Self Review:

- Scroll to the bottom and click "Self Review".
- In the Goal/Success Measures section, enter your goals/ performance expectations for the current review period (upto a maximum of 10). If no specific goals for period under review were set in your last performance evaluation, please write what you worked on and/or were expected to accomplish during the year, including success measures.
- In the "Describe your accomplishments" section describe your goals and success measures.
- Click "Submit" to submit your self review to your supervisor. At this point, your review is locked and is not editable anymore.
- Your supervisor will complete his/her evaluation of your performance, related competencies, and apply an overall rating. Your supervisor will then send your review to their manager for approval. Once the review is approved, you will be able to see all the comments and ratings, and your supervisor will schedule a feedback meeting with you to review and discuss your performance and rating.
- Following the feedback session you will have the opportunity to add comments, indicate if you concur or not with the review and rating, and electronically submit the review to Human Resources.
    - Enter comments in the "Employee Comments" box (required if you click Disagree).
    - Indicate you "agree" or "disagree" with the performance review by selecting the appropriate option and indicate if your supervisor has discussed the review with you.
    - Click "Submit to Human Resources" to submit your review. This action will be considered as "signing" your performance review, not that you have agreed with it, as noted above.
    - Your supervisor will receive an email indicating that you have signed and submitted your review to Human Resources.

☑ Self Review

Employee Information

Name	Staci Mongelli
Department for Review Period	Human Resources
Current Title	Asst Dir Employment
Current Department	Human Resources

🖶 Print Evaluation

Employee Self Review

Goals/ Success Measures 1

Accomplishments 1

New Jersey Institute of Technology

Errors while completing evaluation   ✕

❶ Please enter atleast one Goal/ Success Measure
❶ Please enter atleast one Accomplishment

Accomplishments 1

[Editor toolbar: X, copy, paste, paste as text, paste from Word, undo, redo, spellcheck (ABC▾)]

[Formatting toolbar: B, I, U, S, x₂, x², Iₓ, numbered list, bulleted list, decrease indent, increase indent, blockquote, align left, align center, align right, justify, table, horizontal line, Ω]

+ Add Goals/ Accomplishments   **− Remove Goals/ Accomplishments**

Save   Submit

Dear………,

This is an automated message.

This is to confirm that your self review has been submitted to your supervisor. You can view the submitted self review by logging in to the Performance Management Application to process the evaluation.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Dear……………,

This is an automated message.

………………of ………department has submitted their self review for your evaluation.

Please log into the <u>Performance Management Application</u> to process the evaluation.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

- •Using the drop down box, click on the department, note the review's status, and select employee.
- Complete the "Supervisor Comments" section for each of the employee's goals or performance expectations.
- If you need additional information from the employee you can return the self review to the employee by clicking the "Return for Correction" button. Note reason for return in the comments box.
  - The employee will receive an email to revise their review and resubmit it to you when revised.
- The University Competency section review is completed using the rating scale next to each competency. For the definition of each performance rating please **click here** . You may use the comment box to add comments to support your ratings.
- The Departmental Competency section requires a minimum of three (3) competencies specific to the position. More departmental competencies may be added as appropriate by clicking "Add".
  - If the employee is a supervisor, please note the **Manages and Develops Staff** competency in this section.
  - To access the Competency Directory, **click here** .
  - To access the Competency Directory For Senior Staff, **click here**.
- Indicate an overall rating to the employee's performance.
- Add comments to the "Supervisor Comments" box (optional).
- Complete the performance goals/plans and individual development plan section for employee for next year. We encourage a preliminary discussion with the employee concerning performance goals and development needs.
- You may also save a copy of the review and/or print a copy for your files by selecting "file" and "print" from the browser tool bar.
- Click "Submit to Approver" to send the review to the approver for their review and approval.
  - If you are designated as both the supervisor and approver, you are done.
- Following approval you will receive an email. Once approved, the review is open for the employee to access and read.
- Schedule a review feedback meeting with the employee, reminding them to read the performance review prior to the meeting.
  - Following this feedback session, the employee may add comments and must indicate if she/he agrees/disagrees with the review, and sign (check box) stating that you, the supervisor, has discussed the review with him/her.
  - You will receive an email that the review has been signed and submitted to Human Resources, completing the process.

To approve:

- Scroll to the bottom and click "Approve"
- Using the drop down box, click on the department, note the review's status, and select employee.
- If you need additional information from the supervisor before you approve the review click the "Return for Correction" button. Note reason for return in the comments box.
  - The supervisor will receive an email to revise the review and resubmit the evaluation.
- You may also save a copy of the review and/or print a copy for your files by selecting "file" and "print" from the browser tool bar.
- When you are ready to approve, click "Submit".
  - The employee's performance review is now open for the employee to read in preparation of the feedback discussion meeting with their supervisor.
  - The employee and supervisor will receive an email noting the review has been approved and to schedule the performance review feedback meeting.

☑ Self Review   ☑ Evaluate   ✔ Approve

Select Employee for Filling the Evaluation

Select Department   Human Resources ▼

Select Status   In Progress ▼

Select Employee   ▼

Supervisor Comments 1

Supervisor Comment 1

+ Add Goals/ Accomplishments　　– Remove Goals/ Accomplishments

Supervisor Evaluation

University Competencies

	Exceeded Expectations	Met Expectations	Did Not Meet Expectations	
Accountability	● Exceeded Expectations	○ Met Expectations	○ Did Not Meet Expectations	
Communications	○ Exceeded Expectations	● Met Expectations	○ Did Not Meet Expectations	
Manages and Develops Staff (as appropriate)	○ Exceeded Expectations	● Met Expectations	○ Did Not Meet Expectations	○ N/A
Respectful	○ Exceeded Expectations	● Met Expectations	○ Did Not Meet Expectations	
Service Focus	● Exceeded Expectations	○ Met Expectations	○ Did Not Meet Expectations	
Teamwork and Collaboration	○ Exceeded Expectations	● Met Expectations	○ Did Not Meet Expectations	

Departmental Competencies

NJIT
New Jersey Institute of Technology

Departmental Competencies

Competency 1	● Exceeded Expectations	○ Met Expectations	○ Did Not Meet Expectations
Competency 2	○ Exceeded Expectations	● Met Expectations	○ Did Not Meet Expectations
Competency 3	● Exceeded Expectations	○ Met Expectations	○ Did Not Meet Expectations

+ Add Competency   **− Remove Competency**

NCAA Compliance (for athletics only)

Works in accordance with NCAA rules and regulations   ○ Meets Requirements   ○ Does Not Meet Requirements   ● N/A

Overall Rating

Overall Rating   ○ Exceeded Expectations   ● Met Expectations   ○ Did Not Meet Expectations

Supervisor Comments

Supervisor Comment

Goal Entry

Changes:
- Removed from Evaluation
- New System - Performyard
- Concurrently submitted

Advantages:
- Goals will automatically carry over year to year
- Access goals all year
- Ability to track goal progress with completed tasks and in real time

We will host an additional training in July to prepare everyone prior to evaluation deadlines.

Confirmation

Proceed to submit?

Cancel   Submit

Performance Goals for Next Year

Goal

Individual Development Plan for Next Year

IDP

Return For Correction   Submit   Save

NJIT
New Jersey Institute of Technology

Dear…………,

This is an automated message requesting your action regarding the evaluation of ………..of Human Resources.

Please log into the <u>Performance Management Application</u> to process the evaluation.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

- •Using the drop down box, click on the department, note the review's status, and select employee.
- Complete the "Supervisor Comments" section for each of the employee's goals or performance expectations.
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To approve:

- Scroll to the bottom and click "Approve"
- Using the drop down box, click on the department, note the review's status, and select employee.
- If you need additional information from the supervisor before you approve the review click the "Return for Correction" button. Note reason for return in the comments box.
  - The supervisor will receive an email to revise the review and resubmit the evaluation.
- You may also save a copy of the review and/or print a copy for your files by selecting "file" and "print" from the browser tool bar.
- When you are ready to approve, click "Submit".
  - The employee's performance review is now open for the employee to read in preparation of the feedback discussion meeting with their supervisor.
  - The employee and supervisor will receive an email noting the review has been approved and to schedule the performance review feedback meeting.

[Self Review] [Evaluate] [Approve]

Select Employee for Approving the Evaluation

Role	Approver
Select Department	Human Resources ▾
Select Status	In Progress ▾
Select Employee	▾

IDP

Approver

Approver Comments

Approver Comment

Return For Correction   Submit   Save

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New Jersey Institute of Technology

Home | PSA ▾ | Non-A... | Stats | ⇄ Switch User ▾ | Logout

Confirmation ✕

Proceed to submit?

Cancel   Submit

B I U S x₂ x² Iₓ ≔

IDP

Approver

Approver Comments

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B I U S x₂ x² Iₓ | ≔ ≔ ⇤ ⇥ | 〞 | ≡ ≡ ≡ ≡ | ⊞ ▤ Ω

Approver Comment

Return For Correction   Submit   Save

Dear………………,

This is an automated message.

………………performance review has been approved. Please schedule your performance review and feedback meeting with the employee.

The employees review is open for him/her to read prior to the feedback meeting. After discussing the performance review with the employee, the employee will indicate their concurrence with the review and will electronically submit the performance review to Human Resources. This completes the review process.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Dear………………,

This is an automated message.

Your performance review and been completed and approved. At this time, you may log in to the Performance Management Application and read supervisory comments and ratings.

Your supervisor will be in contact shortly to schedule a performance review and feedback meeting.

After the performance review discussion with your supervisor, please electronically indicate your concurrence with the review and submit it to Human Resources. This completes the review process.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

You are logged in with the following role(s):

1. Employee.
Your evaluation is available for your review and submission to HR. Please click the link below to review/ submit.

<div align="center">

View My Evaluation

</div>

2. Supervisor for employee(s) from 1 department(s). ❶
You will be able to evaluate employees reporting to you.

Instructions

To complete Self Review:

- Scroll to the bottom and click "Self Review".
- In the Goal/Success Measures section, enter your goals/ performance expectations for the current review period (upto a maximum of 10). If no specific goals for period under review were set in your last performance evaluation, please write what you worked on and/or were expected to accomplish during the year, including success measures.
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  - Indicate you "agree" or "disagree" with the performance review by selecting the appropriate option and indicate if your supervisor has discussed the review with you.
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  - Your supervisor will receive an email indicating that you have signed and submitted your review to Human Resources.

To evaluate as the supervisor:

Employee Concurrence

Do you concur with the evaluation?   ● I Concur   ○ I Do Not Concur

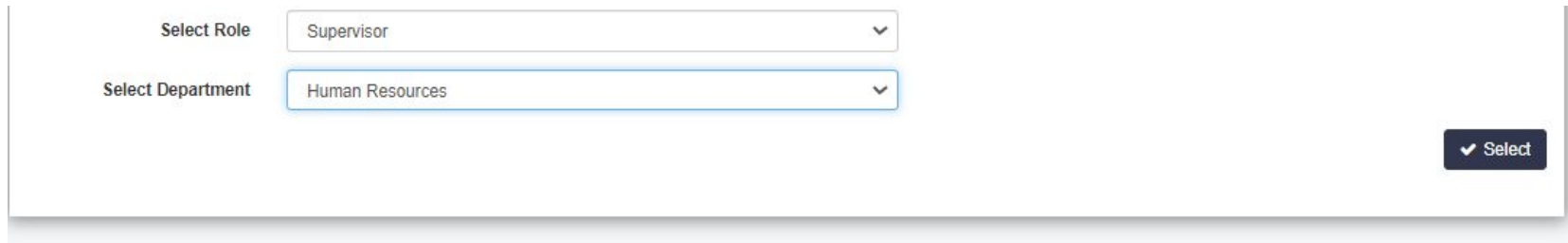Did you meet with your manager to discuss this   ● I Did Meet   ○ I Did Not Meet
review?"

Employee Comments

Comment

Submit to Human Resources

Department Evaluation Status

- Under PSA or Non-Aligned, select "Current Status by Department"

- Select role "Supervisor" or "Approver"

- Choose Department

- You can view status of entire department and export results, if needed

Thank You!

For Assistance and Questions please submit to

Highlander Nexus

FY24
PSA Performance Management Application

Application Capability

- Two supervisor routing and input
- Print friendly capability
- Copy and paste functionality from word document
- Unlimited character limit, per dialogue box
- Error message details
- 120 minute time-out limit
- 15 minute pop-up reminders to save
- Return for correction, with explanation

Accessing the PSA and Non-Aligned Performance Management Applications

MyNJIT login> Performance & Training Card> Performance Management - PSA Staff, Non-Aligned

NJIT is committed to the success and growth of its employees and administers performance management programs in accordance with applicable collective bargaining provisions and the parameter of its performance management program. The evaluation program and process are designed to facilitate ongoing communication and participation of employees in the performance management process, establish accountability for performance and links compensation to performance as applicable. THE ESSENTIAL parameters of performance management include performance PLANNING, performance feedback, and performance evaluation. Performance management is a continual process and, as such, periodic review and revision of goals and objectives is recommended to ensure focused performance.

To access PSA employee evaluations, click here.

To access the prior years' evaluations please click here.

NJIT is committed to the success and growth of its employees and administers performance management programs in accordance with applicable collective bargaining provisions and the parameter of its performance management program. The evaluation program and process are designed to facilitate ongoing communication and participation of employees in the performance management process, establish accountability for performance and links compensation to performance as applicable. THE ESSENTIAL parameters of performance management include performance PLANNING, performance feedback, and performance evaluation. Performance management is a continual process and, as such, periodic review and revision of goals and objectives is recommended to ensure focused performance.

To access Non Aligned employee evaluations, click here.

To access the prior years' evaluations please click here.

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Select Employee for Filling the Evaluation

Select Department | Business Information Systems ▾

Select Status | Not Started ▾

Select Employee | ▾

Department for Review Period	Business Information Systems
Current Title	Sr Information System Analyst
Current Department	Business Information Systems

🖶 Print Evaluation

Evaluation

University Competencies

Effective Communications ○ Meets Requirements ○ Does Not Meet Requirements

Innovative Thinking/ Creativity ○ Meets Requirements ○ Does Not Meet Requirements

Professionalism ○ Meets Requirements ○ Does Not Meet Requirements

Teamwork/ Collaboration ○ Meets Requirements ○ Does Not Meet Requirements

Departmental Competencies
**Please make sure, each competency is less than 250 characters and each departmental competency is different.

Enter departmental competency here	○ Meets Requirements ○ Does Not Meet Requirements
Enter departmental competency here	○ Meets Requirements ○ Does Not Meet Requirements
Enter departmental competency here	○ Meets Requirements ○ Does Not Meet Requirements
Enter departmental competency here	○ Meets Requirements ○ Does Not Meet Requirements

+ Add Competency **— Remove Competency**

NJIT
New Jersey Institute of Technology

| Competency 3 | | ⦿ Meets Requirements | ○ Does Not Meet Requirements |
| Competency 4 | | ⦿ Meets Requirements | ○ Does Not Meet Requirements |

+ Add Competency **− Remove Competency**

NCAA Compliance

Works in accordance with NCAA rules and regulations
　　　　　　　○ Meets Requirements　　　○ Does Not Meet Requirements　　⦿ N/A

Overall Rating

Overall Rating
　　　　　　　⦿ Meets Requirements　　　○ Does Not Meet Requirements

Supervisor Comments

Supervisor Comment

Home PSA ▾ Non-A... ... Stats ⇄ Switch User ▾ 🢔 Logout

Errors while completing evaluation ✕

❗ Enter the justification for recommending the employee for exceptional performance

Goals

Exceptional Performance

Exceptional Performance is defined as demonstrably superior performance for the evaluation period which consistently demonstrates a mastery of the position requirements.
If the employee is being recommended for exceptional performance award, you must provide below a summary demonstrating how the employee meets the criteria of exceptional performance as defined, listing specific contributions, characteristics and outcomes.

☑ **Recommend for exceptional performance award**

| B I U S x₂ x² Iₓ | ... |

Save

Submit

NJIT
New Jersey Institute of Technology

Goal Entry

Changes:

- Removed from Evaluation
- New System - Performyard
- Concurrently submitted

Advantages:

- Goals will automatically carry over year to year
- Access goals all year
- Ability to track goal progress with completed tasks and in real time

We will host an additional training in July to prepare everyone prior to evaluation deadlines.

Dear….,

This is an automated message requesting your action regarding the evaluation of………

Please log into the <u>Performance Management Application</u> to process the evaluation.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Select Employee for Approving the Evaluation

Role	<u>Division Head</u>
Select Department	Business Information Systems ▾
Select Status	In Progress ▾
Select Employee	▾

Justification

Division Head

Division Head Comments

Division Head Comments

☐ **Concur with reccomendation for exceptional performance**

Return For Correction   Submit

Performance Management Application

Justification

Exceptional Performance Notification ✕

Including this employee, you have nominated 1 employees for exceptional performance awards, out of a total of 25 employees, or 4 percent.

Division Head

Division Head Comments

Division Head Comments

☑ **Concur with reccomendation for exceptional performance**

Return For Correction   Submit

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New Jersey Institute of Technology

Dear…….,

This is an automated message requesting your action regarding the evaluation of……….. Please log into the <u>Performance Management Application</u> to process the evaluation.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Select Employee for Approving the Evaluation

Role	**Vice President**
Select Department	Business Information Systems ▾
Select Status	In Progress ▾
Select Employee	▾

☑ Concur with reccomendation for exceptional performance

Vice President

Vice President Comments

Vice President Comment

☐ Concur with reccomendation for exceptional performance

Return For Correction   Submit

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New Jersey Institute of Technology

Exceptional Performance Notification   ×

Including this employee, you have nominated 2 employees for exceptional performance awards, out of a total of 269 employees, or 0.74 percent.

☑ Concur with reccomendation for exceptional performance

Vice President

Vice President Comments

✕	▢	▣	▣	▣	↶	↷

B *I* U S x₂ x² I̶ₓ   ≔ ⋮≡ ⇥ ⇤ 99 ≣ ≣ ≣ ≣ ⊞ ≣ Ω

Vice President Comment

☑ Concur with reccomendation for exceptional performance

Return For Correction   Submit

SAVE

Dear…………,

This is an automated message.

…………..performance review has been approved. Please schedule your performance review and feedback meeting with the employee.

The employees review is open for him/her to read prior to the feedback meeting. After discussing the performance review with the employee, the employee will indicate their concurrence with the review and will electronically submit the performance review to Human Resources. This completes the review process.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Dear………..,

This is an automated message.

Your performance review and been completed and approved. At this time, you may log in to the Performance Management Application and read supervisory comments and ratings.

Your supervisor will be in contact shortly to schedule a performance review and feedback meeting.

After the performance review discussion with your supervisor, please electronically indicate your concurrence with the review and submit it to Human Resources. This completes the review process.

Thank you.
Department of Human Resources
New Jersey Institute of Technology

Your evaluation is available for your review and submission to HR. Please click the link below to review/ submit.

Please note that you should have a performance based evaluation meeting with your supervisor within ten (10) working days of having received the email informing you that your evaluation is now available for your review. You must electronically submit the evaluation to Human Resources within five (5) working days of the meeting, and no later than September 15.

View My Evaluation

Department Evaluation Status

- Under PSA or Non-Aligned, select "Current Status by Department"

- Select role "Supervisor" or "Approver"

- Choose Department

- You can view status of entire department and export results, if needed

Thank You!

For Assistance and Questions please submit to

Highlander Nexus

Performance Management

Objectives

Part I: Performance Review
- Discuss the importance of performance appraisals
- Define the steps in the performance appraisal process
- Discuss performance evaluation and assessment

Part II: Goal Setting & Performyard
- Learn how to set and manage goals
- Discuss the benefits of goal setting
- Setting SMART goals
- Establishing performance expectations

Part III: Performance Review Meeting
- Learn how to give meaningful feedback and how to conduct the meeting
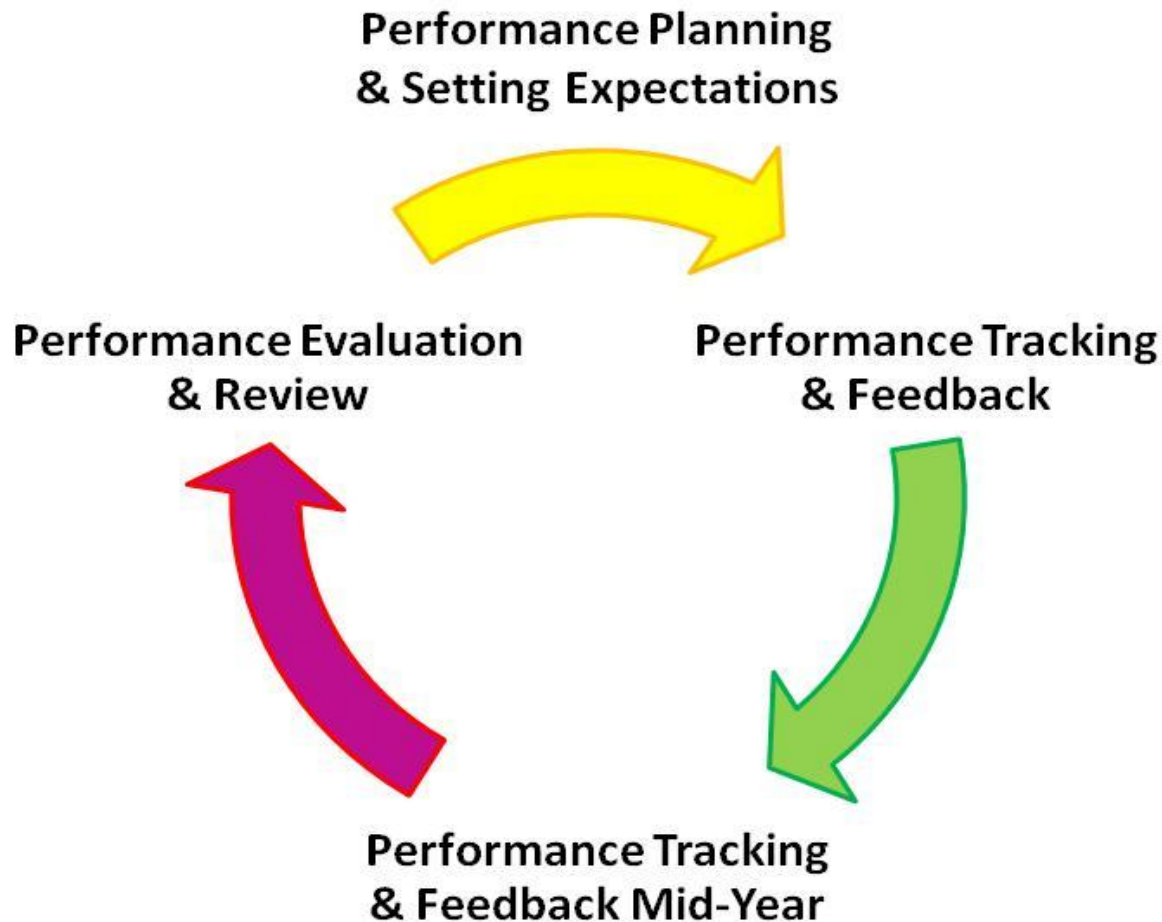- Discuss handling poor performers/performance

Why Do It?

Because:

- Good, effective performance management is a key element in the morale and retention of our best people

- The performance review is a tool to help managers maximize the performance of their employees

- Feedback mechanism

- Provides formal codification of employee performance for a specified time period

- Fairness and equity will drive retention

Performance Management Cycle

Performance Planning & Setting Expectations

Performance Evaluation & Review

Performance Tracking & Feedback

Performance Tracking & Feedback Mid-Year

Performance Reviews

Rating Guidelines

- Make thoughtful decisions, give yourself time to think

- Rate results, not the person

- Rate the current performance year only

- Rate present performance, not potential

- Rate the employee's work as a whole

- Rate performance, not salary level or compensation

- Beware of managerial "guilt"

PSA Ratings

- Under the PSA union the rating is a 3-point scale.

- The number of employees receiving a rating of "Does Not Meet Job Requirements" shall not exceed 4% of eligible employee union members.

- The number of employees receiving an Exceptional Award shall not exceed 20% of eligible employees in each Vice President Area.

- The threshold is based on the total population in EACH VP AREA. This means- each VP area could have different thresholds.

Ways to Reduce Bias

- Have clear goals and performance expectations

- Have regular feedback meetings

- Base ratings on results and behaviors

- Have consistent standards for those being evaluated

Performance Reviews- What NOT to say

- If the employee has been out on a validated medical leave, do not mention this in the evaluation- the goals will need to be adjusted

- ADA Accommodations

- Unexcused absences, unless already discussed (with follow-up actions)

- Do not make the evaluation personal or about personality; support the review and feedback with observable, objective, and quantifiable data.

Writing Performance Goals

Definition

A goal is, "a statement that describes an action or task with a *measurable end result* and *timeframe for completion*."
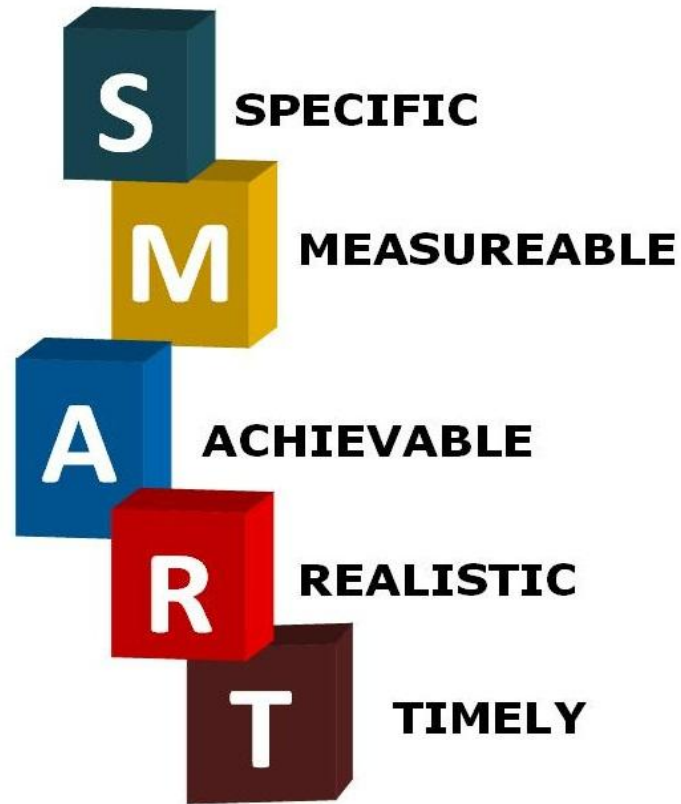
Benefits to Goal Setting

- Focuses your time and energy on actions that make a difference
- Helps you decide between conflicting priorities
- Ensures meaningful contributions
- Ensures actions are aligned with the 2030 Strategic Plan

Setting Performance Expectations

Alignment | Clarity

```
┌─────────────────────────┐
│    2030 Strategic Plan   │
└─────────────────────────┘
              ▼
┌─────────────────────────┐
│      Division Goals      │
└─────────────────────────┘
              ▼
┌─────────────────────────┐
│     Department Goals     │
└─────────────────────────┘
              ▼
┌─────────────────────────┐
│      Individual Goals    │
└─────────────────────────┘
```

Setting SMART Goals

Guidelines for Setting SMART Goals

What: define expectations in action-oriented terms

How: identify key behavioral expectations

Who: who is accountable

When: milestones and deadlines

To what extent: what does success look like

Not "SMART"

Answer the phone within two rings.

"SMART"

Answer the phone within two rings to decrease wait times for clients by 15%. If not possible due to unforeseeable circumstances, return each missed phone call by the end of the workday.

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New Jersey Institute of Technology

Performyard - Sneak Peak

- Can create as many goals as needed
- Can input and track numeric goals (Target/Units)
- Due Date will always be March 31st
- Can assign department goals to multiple people at once.

Individual Development Plan (IDP) Goals

- Focus on what can be done to increase effectiveness

- Highlight areas for professional growth, including new skill or knowledge

- Look to strengthen areas of current strength (making the strong, stronger)

IDP goals are not performance goals, but are based on the competencies your position requires for success.

Development Strategies

- On the job
- Coaching
- Special assignments
- Presentations to group
- Cross-training in department
- Observation of "mentor"
- Courses, seminars, workshops
- Professional group membership
- LinkedIn Learning Courses

IDP Examples

IMPROVEMENT/DEVELOPMENT GOAL (Identify up to 3 development goals)	ACTION STEPS TO ACHIEVE GOAL	ACCOMPLISHMENT
To become proficient in writing formulas in MS Excel	Participate in a LinkedIn Learning Excel formula class, by 11/15/24.	
To learn how to prepare and monitor/track the division budget	In FY25 assist budget manager in monitoring division's FY25 budget and prepare the FY26 budget	

Performance Evaluation Meeting

Effective Feedback Conversations

Key Principles:

- Communication

- Fairness

- Respect

- Employee Involvement

- Conflict Resolution

Tips for Resolving any Disconnects

- Stick to facts

- Link areas of disconnect to the employee's or NJIT's goals

- Remain open to revising your opinion

Outcome of Meeting

Direct report should have a clear idea of:

- ☐ Accomplishments and shortfalls
- ☐ Achievement of goals from last year?
- ☐ Strengths and development needs
- ☐ Areas for improvement
- ☐ What is required for excellence
- ☐ Goals and objectives for the new year

Thank You!

For Assistance and Questions please submit to

Highlander Nexus