

# RATINGS & THE ANNUAL REVIEW

## REFLECT ON EXPECTATIONS

### Managers:

Ongoing conversations with your employees should lead up to the annual conversation, including the performance rating. Opportunities for distinguishable and outstanding contributions may not present themselves every year. Be prepared to support your consistent, strong, and effective performers eager to advance by collaborating on goal setting and seeking out development opportunities. The annual review is meant as a moment of reflection and look back but also presents the opportunity to engage in forward-thinking both in terms of future business needs and development opportunities to engage your staff.

### Employees:

Opportunities for exceptional impact are unique and may not occur every year. Remember that achieving full and consistent impact reflects continuous positive contribution and that ratings are just one component of the annual review process. Talk with your manager about opportunities to advance your level of mastery and use goal-setting conversations to enhance your professional engagement.

## CONTEXTUALIZE THE RATING WITH YOUR OVERALL PERFORMANCE CONVERSATION

### Managers:

Ensure the rating you are assigning aligns with the overall performance conversation. There should not be any surprises, and no matter what the rating, be prepared to engage in meaningful conversations and answer any employee questions.

### Employees:

Consider your rating within the context of your overall conversation. Is the overall conversation positive and constructive? Did you have the opportunity to discuss accomplishments, outline goals, and identify growth opportunities?

## RATING GUIDE

	Definition on PeopleSoft	Guidance/Tips for Rating
Exceptional Impact	Contributions have significant and consistently exceptional impact and value to the department and/or the organization. Makes unique, often one-time achievements that measurably advance progress towards organizational goals and/or result in major improvements. Easily recognized as a role model by high-performing peers. Viewed as an excellent resource to provide expertise, guidance, advice, mentorship, or support to others. Demonstrates a range of high-level capabilities and actively takes on higher levels of responsibility.	Distinguishes performance from Full Impact with the following: <ul style="list-style-type: none"><li>Consistently exceptional performance exhibited throughout the year</li><li>Considered a “distinguished” employee and a true expert in their field (i.e., everyone goes to them above all others for help)</li><li>Has had unique, stand-out achievements</li><li>Has led a substantial initiative(s) without oversight during the past year</li><li>May be ready for promotion to next level</li></ul>
Full/Consistent Impact	Consistently demonstrates meaningful impact through accomplishments and contributions. This level of impact is reflective of a fully qualified, competent, and experienced individual in this role. Viewed as someone who gets the job done and effectively prioritizes work and produces strong results. Contributes positively to the overall objectives of the department and /or the larger organization. Achieves valuable accomplishments in several important areas of the job and/or on assigned projects.	<ul style="list-style-type: none"><li>All employees are presumed to be achieving their goals on a consistent basis and fully meeting expectations</li><li>Project work is accomplished on time and completely</li><li>Full contributor who builds good relationships, is a good team contributor, helps others, and recognized as a partner by clients</li><li>Important asset to the team, department, and university</li></ul>
Learning/Building	Needs to gain proficiency and/or productivity in the position to achieve consistent impact. May achieve some, but not all, goals. Stronger or additional knowledge, skills and abilities need to be demonstrated for consistent success in the role. This rating is recommended for use when an employee is still coming up-to-speed with their job responsibilities based on limited tenure in the role.	<ul style="list-style-type: none"><li>Employees new to Harvard and with less than 12 months in position may still be mastering the knowledge, skills, and abilities</li><li>Employees promoted or transferred during the past year and continuing to learn/master skills required for the new role</li><li>Employees not fully meeting expectations, but a Needs Improvement rating is not right for the situation; coaching and possible documentation should have occurred</li></ul>
Needs Improvement	The quality of performance is below expectations for the role. Knowledge, skills, abilities and/or productivity have not been demonstrated at the appropriate levels.	<ul style="list-style-type: none"><li>Employees should have been counseled</li></ul>