

**THE CITY UNIVERSITY OF NEW YORK  
PERFORMANCE MANAGEMENT MEMORANDUM  
LEHMAN COLLEGE HEO SERIES**

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Employee Name \_\_\_\_\_  
Functional Title \_\_\_\_\_ Payroll Title \_\_\_\_\_  
Date of Evaluation \_\_\_\_\_ Period of Evaluation \_\_\_\_\_  
Supervisor/Evaluator \_\_\_\_\_ Department \_\_\_\_\_

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**I. KEY RESPONSIBILITIES and PERFORMANCE TARGETS:**  
(List the most critical position responsibilities and/or duties and the targets/standards for their successful performance that were established with the employee at the beginning of the rating period.)

**1. Responsibility:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Performance Target/Goal: \_\_\_\_\_

Rating/Comments (See key below): \_\_\_\_\_  
\_\_\_\_\_

**2. Responsibility:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Performance Target/Goal: \_\_\_\_\_

Rating/Comments (See key below): \_\_\_\_\_  
\_\_\_\_\_

**3. Responsibility:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Performance Target/Goal: \_\_\_\_\_

Rating/Comments (See key below): \_\_\_\_\_  
\_\_\_\_\_

Attach additional page, if necessary.

Performance Rating Key:      1 = Outstanding (Exceeds goals)  
   2 = Effective (Meets Goals)  
   3 = Needs Improvement (does not meet all goals)  
   4 = Unsatisfactory (does not meet goals)

## II. ADDITIONAL GOALS

**A.** Discuss specific targets/goals that the employee was expected to meet for the period being evaluated that are not included in the key responsibilities and performance targets in Section I. (For example: a special project, implementation of a new procedure, serving on a committee or task force, etc.)

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**B.** Were the targets/goals met by the employee? Include information on the quantity (promptness and speed of work) and quality (accuracy and completeness of work).

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**III. CUNY CORE COMPETENCIES:** The descriptions of the core competencies provide a sampling of the types of behaviors an employee should demonstrate if they possess competency in that area. Your assessment should encompass the overall range of behavior. Please provide comments about the employee's strengths and weaknesses in each of the core competencies identified below.

**A. Communication** – Communicates oral and written information concisely in a form appropriate to the target audience. Listens effectively, seeks and provides timely, frank, honest feedback.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_      2. Effective\_\_\_      3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_      5. Not Observed\_\_\_

**Comments:**

**B. Interpersonal** – Treats people with respect and fairness. Demonstrates interest and concern for others. Recognizes need for strong professional internal and external relationships. Makes Commitments and fulfills promises. Handles adversarial interactions with sensitivity.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_      2. Effective\_\_\_                      3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_      5. Not Observed\_\_\_

**Comments:**

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**C. Customer Service** – Successfully meets internal and external customer needs. Advocates for customers. Transforms internal processes to meet customer expectations. Provides satisfaction by utilizing available resources.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_      2. Effective\_\_\_                      3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_      5. Not Observed\_\_\_

**Comments:**

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**D. Professionalism** – Demonstrates knowledge of and commitment to the practices of the field. Practices high standard of behavior within an occupation. Respects and maintains the confidentiality of all appropriate issues and information. Consistently improves professional knowledge through learning, practices and teaching.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_      2. Effective\_\_\_                      3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_      5. Not Observed\_\_\_

**Comments:**

**E. Diversity** – Demonstrates commitment in practice and philosophy to all Federal, State and City EEO laws and University policies and procedures regarding diversity in the workplace. Shows and fosters respect and appreciation for each person. Strives to understand the world-view of others.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_              2. Effective\_\_\_              3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_              5. Not Observed\_\_\_

**Comments:**

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**F. Management** – (primarily important in the HEO/HEA titles) Committed to the organizational mission and accomplishing goals. Self motivated; self observant; flexible; decision-maker. Elicits participation, accountability, teamwork and employee commitment. Empowers and develops staff. Manages processes through planning and strategizing. Identifies and meets objectives within time-frames and budgets.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_              2. Effective\_\_\_              3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_              5. Not Observed\_\_\_

Comments:

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**G. Leadership** – (Primarily important in the HEO/HEA titles) Demonstrates a leadership style consistent with college values. Creates and articulates a shared organizational vision that provides a sense of mission and rationale for others. Serves as an innovative agent for meaningful change. Demonstrates courage and integrity.

Competency's Priority:

Critical\_\_\_                      Necessary\_\_\_                      Useful\_\_\_

Performance assessment for this competency:

1. Outstanding\_\_\_              2. Effective\_\_\_              3. Needs Improvement\_\_\_  
4. Unsatisfactory\_\_\_              5. Not Observed\_\_\_

Comments:

**IV. DOMAIN RELATED COMPETENCIES:** Select 1 or 2 domain competencies (technical skills) that are important to the employee's position responsibilities and identify and rate them below.

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**V. PROFESSIONAL GROWTH AND DEVELOPMENT:**

**A. Particular Strengths of Employee**

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**B. Areas to be Improved and Developed –** (Indicate means for making improvements.)

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**C. Projected Goals and Targets for the Coming Year –** (To be completed for the next evaluation.) Include any changes/additions to the employees key responsibilities. Include goals and targets for the coming year. These should be related to department, division and college goals.

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**D. Contributions to the College Community**

**VI. OVERALL RATING**

In my opinion the overall rating for the period covered by this performance management memorandum is: (Check One)

- 1 = Outstanding (Exceeds goals)
- 2 = Effective (Meets Goals)
- 3 = Needs Improvement (Does not meet all goals)
- 4 = Unsatisfactory (Does not meet goals)

Additional pertinent information influencing the rating:

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**VII. EMPLOYEE'S COMMENTS:**

I have reviewed this performance management memorandum on the date indicated and have discussed it with my rating supervisor/manager. My signature does not necessarily signify agreement. I understand that I may add comments regarding this memorandum.

EMPLOYEE COMMENTS: (Attach additional page, if necessary)

Employee's Signature: \_\_\_\_\_ Date: \_\_\_/ \_\_\_/ \_\_\_\_\_

Rating Supervisor/Manager Signature: \_\_\_\_\_ Date: \_\_\_/ \_\_\_/ \_\_\_\_\_