

Management of Performance and Development (MoPD)	Cyngor Cyllido Addysg Uwch Cymru Higher Education Funding Council for Wales	
Guidance Notes		

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Introduction

HEFCW has devoted much resource to developing, evaluating and improving its performance management system, drawing on best practice elsewhere and involving staff in working group discussions.

The cornerstone of good practice is to share information and views on a regular basis throughout the year in a spirit of continuous improvement. Most organisations have in place a variety of formal mechanisms which encourage some regular quality discussions between staff and their line manager, on work to date, future work and learning and development issues. Within HEFCW such mechanisms exist as the interim reviews.

Purpose of performance management

The purpose of performance management is to assist in:

- communicating to job holders what is expected of them and how their work contributes to the objectives of the organisation;
- providing feedback on performance (key activities, values and behaviours and objectives);
- promoting and evaluating learning and development;
- informing decisions on pay;
- managing poor performance.

Stages in the performance year

The appraisal year commences in April and all line managers will have completed their annual performance review by the end of May of the following year. The primary focus of the annual review is the outcome of the previous performance year. It is this assessment which feeds into decisions about performance pay.

During August and December, job holders and their line managers conduct interim reviews, the focus of which is to review performance to date within the three areas: Key Activities, Values and Behaviours and Objectives.

A set of competencies (HEFCW's Values) underpin the performance reviews. These set out the behaviours HEFCW believes are essential to its success.

Diversity and equality of opportunity

Fairness is essential to performance management. Reviewers and countersigning officers should guard against any form of discrimination when assessing a jobholder's performance and ensure that jobholders have equality of opportunity to develop their performance fully. Reviewers and countersigning officers must ensure that the jobholder is not unfairly treated because of their gender, marital status, age, race, disability, full or part-time status, religion, sexual orientation, language or any personal characteristic of the individual. Making assumptions or stereotyping can also be discriminatory.

An individual's specific requirements will be taken into account within the performance management scheme and individuals will be treated on a case by case basis and the guidelines should be read in this context.

Each year we monitor the outcome of performance reviews to ensure that discrimination is not taking place. This monitoring is required for compliance with the Race Relations Amendment Act, Disability Discrimination Act and Gender Equality Duty specifically on recording diversity and also demonstrates our own commitment to diversity under the Single Equality Scheme.

Training and support

Performance reviews should not be carried out until line managers have been properly trained. Workshops will be run as required, in February/March of each year. If staff are unable to attend these sessions, HR will either arrange an off-site training session, or a one-to-one coaching session, depending on skill level. If countersigning officers, reviewers or job holders are unclear about any aspect of the performance review they should contact HR for guidance.

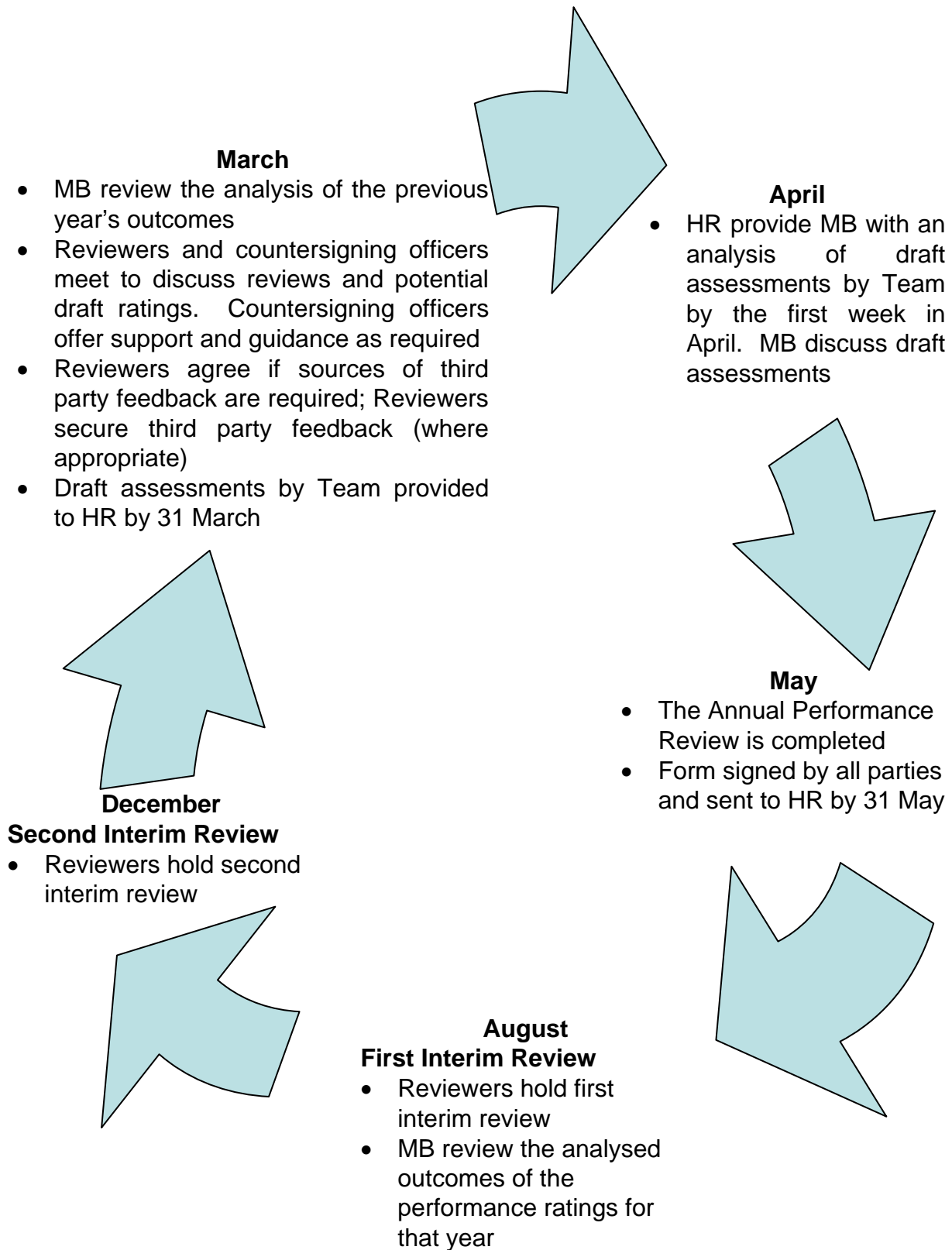
HR will review the requirements for appraisal training annually and provide ad hoc coaching as required.

Evaluation

The MoPD scheme will be evaluated each year. This evaluation will be presented to MB by HR during July/August. To evaluate the scheme HR will request comments from staff and Works Council, which will be summarised and reported to Management Board with any appropriate recommendations for action.

Timetable

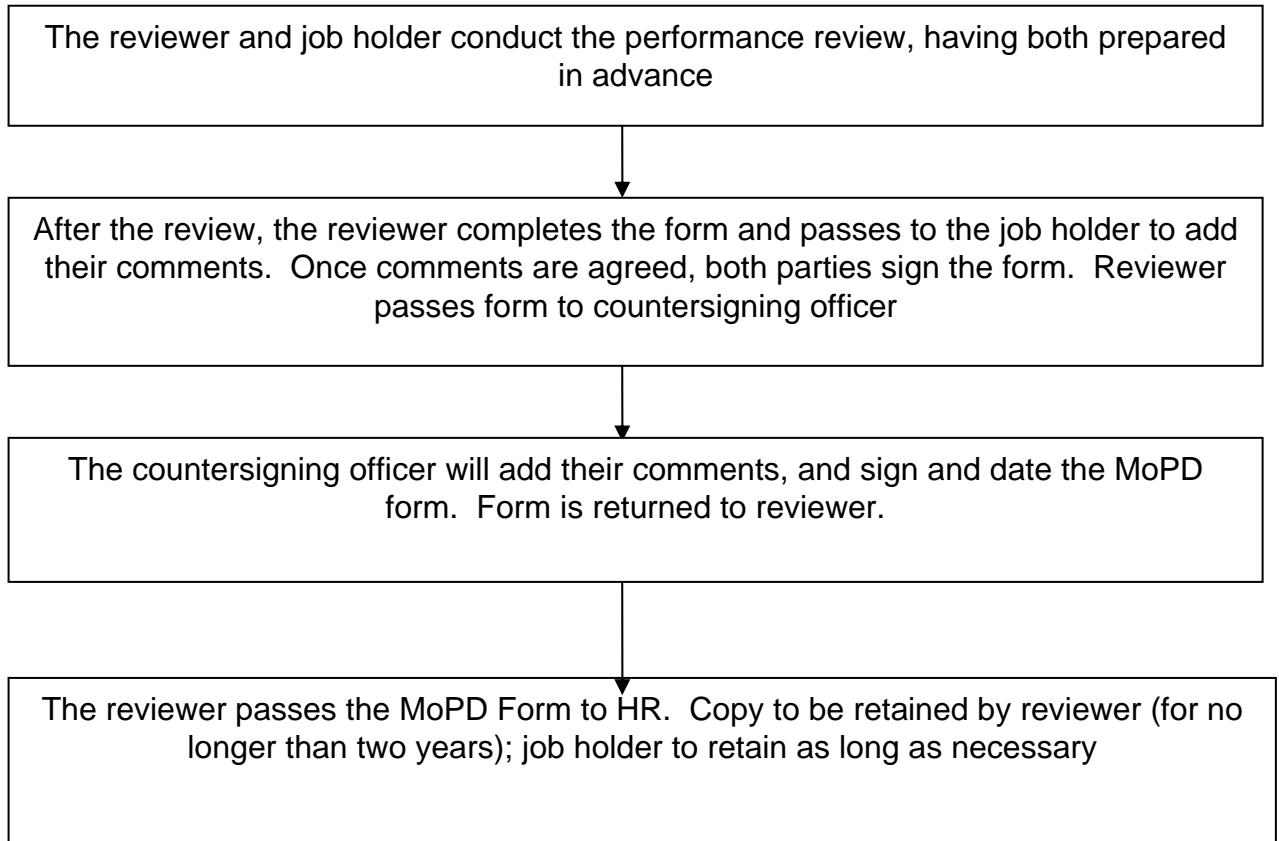
The performance year runs from 1 April to 31 March each year.



Process for dealing with the performance review forms

The reviewer is responsible for the performance review form and for ensuring that it arrives with HR fully completed and signed by 31 May:

The process is as follows:



Keeping to the deadline set by HR for annual performance reviews is essential, not only to ensure that the process is completed on time, but also to ensure job holders are not left waiting unnecessarily for their review or delivery of their training needs. HR and Finance normally implement the pay award in April. One late submission of a form to HR can result in the pay award for all staff being delayed. Late submissions also cause difficulties in prioritising training, which in turn impacts on budgets. Late submissions also have an effect on resources due to the amount of follow up work required to obtain the documentation. If there are extenuating circumstances that might result in late submission please inform HR as soon as possible.

The annual performance review

Purpose

The purpose of the annual performance review is to review the previous year and to:

- review the key activities against performance;
- review the outcomes against the objectives;
- review the values evidenced overall;
- review the main learning and development activities;
- consider the impact of training undertaken during the performance year;
- review the job description to ensure it reflects current role;
- agree new objectives and work priorities for the new performance year;
- agree new learning and development objectives for the new performance year;
- provide the performance rating;

The focus on 'results'

Although a primary focus of the annual performance review is on results achieved, this has to be considered in the context of overall objectives and the HEFCW values. The review should therefore focus on three areas:

- achievement of results against key activities
- the degree to which HEFCW values are demonstrated (ie the way in which the results are achieved)
- the extent to which results help to achieve overall objectives

How do we Assess Attainment of Results?

Results are assessed both in terms of quality and frequency as defined below:

Quality Aspects

Excellent	Very Good	Good	Requires improvement	Poor
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Frequency Aspects

Consistently (80% of the time or more)	Often (50-79% of the time)	Occasionally (30-49% of the time)	Rarely or never (0-29% of the time)
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Please refer to Annex A for all assessment marks

The assessment of performance is measured using the following scale:

Assessment Rating	Comments
<p>Exceptional (Box five)</p>	<p>The job holder will have exceeded the requirements of the post in all three of the areas being assessed (key activities, values and objectives).</p> <ul style="list-style-type: none"> • they will have made a significant contribution to the achievement of organisational objectives; • to achieve this, the job holder will have shown exceptional drive and commitment. This is not necessarily about working long hours although the employee will undoubtedly have been working under pressure, possibly in exceptional circumstances; • they will have demonstrated all HEFCW values in the course of their work, and their achievement will be generally recognised by colleagues.
<p>Requirements of the post fully met – requirements exceeded in one or more substantial areas (Box four)</p>	<p>The job holder will have met the requirements of the post in all the areas being assessed (key activities, values and objectives):</p> <ul style="list-style-type: none"> • they will have carried out the full range of the key activities to the required standard; • objectives, where possible / feasible, will have been achieved; • all of the HEFCW values will have been displayed and; • they will have exceeded in one or more substantial areas.
<p>Requirements of the post fully met (Box three)</p>	<p>The job holder will have met the required standard for the post in all of the areas being assessed (key activities, values, and objectives):</p> <ul style="list-style-type: none"> • they will have carried out the full range of the key activities to the required standard; • objectives, where possible / feasible, will have been achieved; • the majority of the HEFCW values will have been displayed. <p>New Starters</p> <p>Where the job holder has been unable to demonstrate certain key activities due to the timing of the commencement of employment and the cyclical nature of the duties of the post, these will be not form part of the assessment and the job holder is to be assessed on the remaining key activities, values and objectives. The remainder of these areas should therefore be deemed as the full requirements of the role.</p>

Assessment Rating	Comments
<p>Requirements of the post met in part – scope for improvement (Box two)</p>	<p>New Starters</p> <p>The job holder will have not had sufficient time in post to demonstrate required standard in one or two of the areas being assessed (key activities, values, or objectives):</p> <ul style="list-style-type: none"> • they might not have been able to carry out the full range of the key activities due to a lack of skills; and / or • they may have only partly achieved or not achieved most or all of their objectives; and / or • they might not have demonstrated most or all of the values to the level required for the post. <p>This would be because of a lack of experience in the post and therefore the reviewer needs to take this into consideration.</p> <p>The reviewer needs to agree a development plan with the job holder which forms part of the MoPD documentation.</p> <p>Under Performance</p> <p>The job holder will have failed to meet the required standard for the post in one or two of the areas being assessed (key activities, values, or objectives):</p> <ul style="list-style-type: none"> • they might not have carried out the full range of the key activities to the required standard; and / or • they may have only partly achieved or not achieved most or all of their objectives; and / or • they might not have demonstrated most or all of the values to the level required for the post. <p>This may be because of a lapse or dip in performance or, generally, they may not be meeting expectations.</p> <p>The reviewer needs to take into consideration training received, expectations and was the performance plan realistic?</p> <p>The reviewer needs to agree an improvement plan with the job holder.</p>
<p>Unacceptable (Box one)</p>	<p>The job holder will be failing to meet the required level of performance in all three of the areas being assessed (key activities, values, and objectives):</p> <ul style="list-style-type: none"> • they will not have carried out the full range of the key activities to the required standard; and • they will have only partly achieved or not achieved most or all of their objectives; and • they will not have demonstrated most or all of the values to the level required for the post.

Consistently = 80% of the time or more Often = 50 – 79% of the time Occasionally = 30-49% of the time Rarely or never = 0-29% of the time
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The expected level of performance in HEFCW is 'fully met' (box three) and this should be the starting point in making assessments, together with the assessment of whether job holders are not yet meeting this expectation, or are exceeding it.

Job holders that are considered to have met HEFCW's expectations must have delivered on their key activities and objectives; must have consistently or often demonstrated the behaviours; and in a way which meets our values.

In particular circumstances, eg for job holders new to the post, the category of 'met in part' (box two), should be seen as entirely acceptable and the contribution of job holders who perform at this level should be fully recognised.

Job holders will be helped and supported to achieve their optimum level of performance.

It is important to recognise that there may be occasions when, although a job holder may consistently meet and exceed all their key activities and objectives, because they do not adhere to the HEFCW values, their performance has an adverse affect on their colleagues, their team, the organisation or other stakeholders. In such circumstances, the review should take this fully into account in arriving at the appropriate assessment rating.

Appraisal training will be given as and when required and will aim to give all staff a clear understanding of the assessment scale and the descriptors, as well as an understanding of the performance review system as a whole. It will also allow staff to be kept up to date with any changes to the process.

HR will review the requirements for appraisal training annually and provide ad hoc coaching as required.

The HEFCW values

HEFCW attaches importance to both the outcomes of our work and the skills and processes used to produce the outcomes. Critically important as processes are the way we manage ourselves (eg our own time management, management of our personal work life balance and stress levels), as well as how we interact with others (colleagues and stakeholders). To help us review these aspects of our work, we have produced a set of values. These values reflect the competencies that enable us to achieve excellent results.

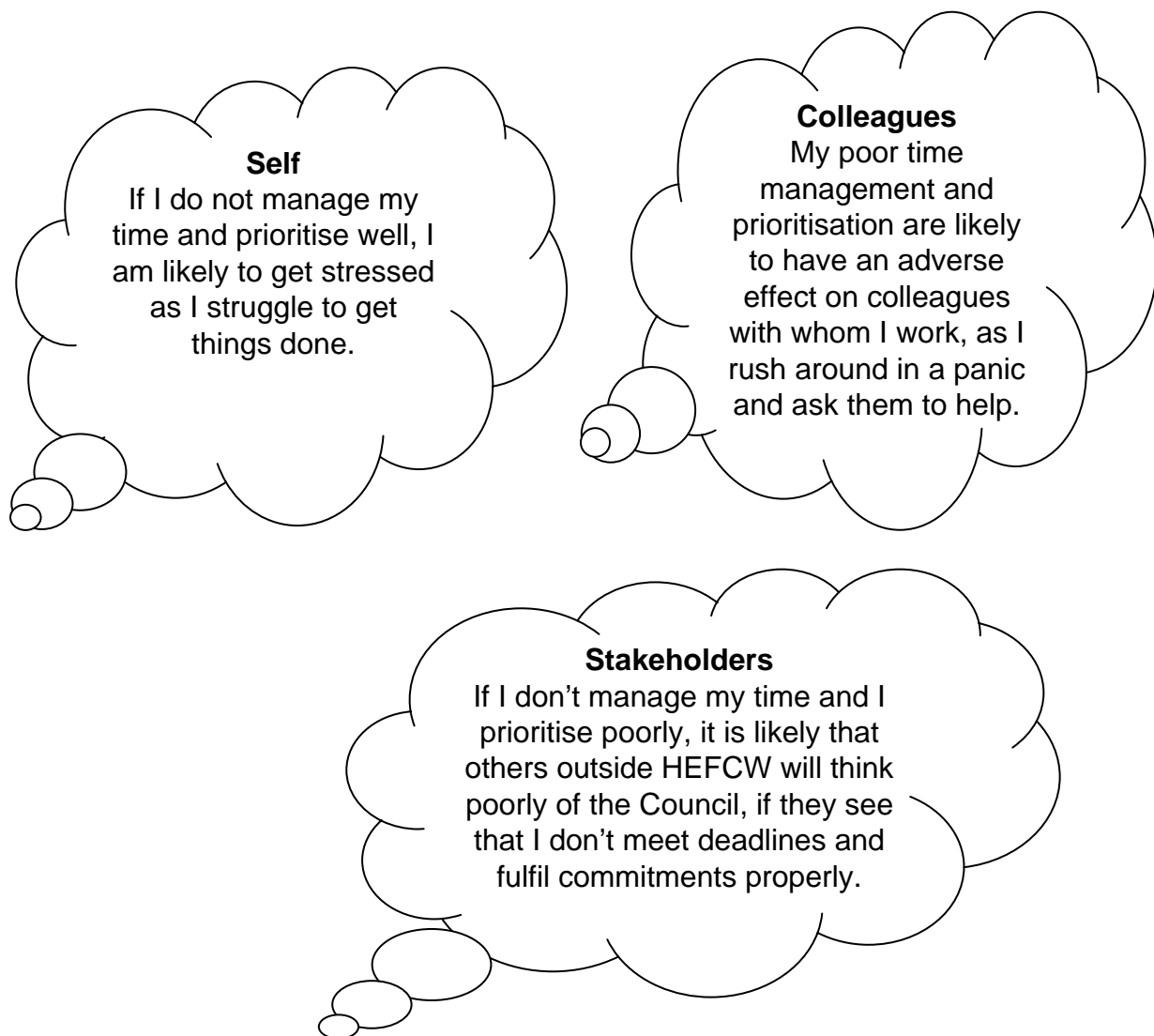
The following table sets out HEFCW's agreed values and provides examples of positive and negative behaviours that illustrate these values. These are purely illustrative and are not meant as exhaustive lists.

They cover five key areas:

Value	Indicative positive Behaviours	Indicative Negative Behaviours
<p>Acting with Integrity</p> <ul style="list-style-type: none"> • Be consistent • Be truthful • Be open • Communicates frankly 	<ul style="list-style-type: none"> • Adheres to policies and procedures • Protects others' privacy • Provides honest and open feedback • Displays sensitivity and tact • Treats similar cases similarly 	<ul style="list-style-type: none"> • Is unreliable • Offers biased views • Has an inconsistent approach • Disregards policies and procedures • Seeks own gain to the detriment of others
<p>Professionalism</p> <ul style="list-style-type: none"> • Apply knowledge & expertise • Know/address your audience • Take responsibility for own area • Exercise due discretion • Seek continuous improvement 	<ul style="list-style-type: none"> • Produces high standards of work • Displays appropriate behaviour • Manages workload proactively and with priority • Addresses audience appropriately • Displays discretion • Behaves firmly and courteously in dealings 	<ul style="list-style-type: none"> • Displays carelessness and poor standard of work • Lacks commitment and is unreliable • Is indiscreet • Is disrespectful to colleagues • Is ineffective in communication • Misses deadlines
<p>Forward Thinking</p> <ul style="list-style-type: none"> • Scan horizon actively • Plan tasks & assess risks effectively • Prioritise 	<ul style="list-style-type: none"> • Is proactive • Seeks continual improvement in work and procedures • Promotes and encourages new ideas and ways of working • Plans and completes tasks within timeframe • Thinks ahead to identify problems and solutions 	<ul style="list-style-type: none"> • Is reactive • Resists change • Shows minimal productivity • Acts defensively • Waits until items reach crisis point • Is unprepared • Displays insularity
<p>Partnership Working</p> <ul style="list-style-type: none"> • Identify partners (internal, external) • Be clear about outcomes sought • Develop effective working relations 	<ul style="list-style-type: none"> • Engages in and develops relationships • Shares information with others • Consults and collaborates with others • Maintains good working relationships • Co-operates with colleagues and partners 	<ul style="list-style-type: none"> • Is unapproachable • Operates in isolation • Avoids consultation and collaboration • Has a rude or unhelpful attitude • Has poor working relationships

<p>Valuing & Supporting Each Other</p> <ul style="list-style-type: none"> • Respect others' views • Value each others' skills/contributions • Give & receive effective feedback • Respond to others' priorities • Provide help (formal/informal) 	<ul style="list-style-type: none"> • Respects other views • Seeks to help and support others • Acknowledges differences and makes positive use of these • Is considerate to others' needs and circumstances • Is constructive with feedback • Meets deadlines to ensure these do not adversely affect others • Listens actively 	<ul style="list-style-type: none"> • Does not co-operate with others • Lacks appreciation of others' contribution • Denies responsibility • Has an insensitive attitude • Is critical of others • Ignores others' views, queries or concerns • Is disrespectful
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The values apply equally to all grades. Each value has a number of elements which primarily impact on either ourselves, other staff or have a corporate impact. An example of how our behaviour impacts at these three levels is shown below:



How do we assess values?

Some of the values will be more critical in a job than others. In completing the review the reviewer and job holder should discuss performance against specific elements of the values, focussing on and praising those values that have been clearly demonstrated, and identifying areas where development would have the most impact on results in the coming year.

Provision of Feedback (Reviewer and 'third party') - Optional

It is important that appropriate inputs are made to annual performance reviews by those who are best equipped to do so. If a job holder provides a service to other teams or works for more than one individual, it might be appropriate to seek feedback from others within the team or from other teams to enable the role to be fully appraised. For most of us, our peers and external stakeholders may have helpful feedback on how we are doing. Sometimes, the most constructive and insightful feedback can come from colleagues in other teams. The expectation is that, where this is required, feedback should not be sought from more than two colleagues (unless appropriate and agreed otherwise) to ensure it is kept to a manageable total. Reviewers should encourage comments from these identified colleagues, and also offer to staff who are managed by the job holder the opportunity to comment on their performance.

Reviewers must agree with the job holder, and discuss the identity of the colleagues with whom they have spent most of their time working in the year/period, well in advance of the annual performance review meeting so that feedback can be sought from them in time for the annual performance review.

Comments should normally only be provided if the colleague providing them is prepared to make them face to face to the job holder, and any written feedback should also be available to the job holder. Comments should always be backed up with real examples.

Comments provided on the line manager should be given in confidence. Where comments are very critical, the individual giving the feedback should talk face to face to the reviewer to ensure that maximum understanding of the issues is secured. The reviewer should assess this feedback, collect any further corroborative information and, if they propose to reflect it in the performance review, this should be discussed fully with the job holder. This feedback alone should not influence the review but confidential feedback should always be corroborated with other sources of information.

Self Assessment

Throughout the review process, job holders should be encouraged to take as much ownership as they can of the feedback that is used as the basis of assessment. There are a range of options: job holders may wish, for example, to agree with their reviewer that they should take the lead in securing feedback on their performance from others, in a format that can be used in the performance review meeting.

Job holders are encouraged to fully prepare for their annual performance review meeting, including an initial assessment of their performance, an assessment of what they would like to achieve in the future and their future learning needs. A section is included on the MoPD form and job holders are encouraged to make their own comments.

Upward Feedback

During reviews, the reviewer should encourage job holders to provide feedback on how they feel they are managed. This feedback can help the line manager to identify where they can improve their skills and also it can help to build the relationship between reviewers and job holders.

Eligibility for performance increases and reviews

If a job holder is new to HEFCW it is important to recognise that there is a period of time in which they need to become familiar with their job, which will impact their pay increases in line with the Pay & Grading policy.

Date employment at HEFCW began	Eligibility
1 February – 31 July	Individuals joining in the period 1 February to 31 July, will remain on their appointed salary step until 31 July the following year. There will be no eligibility for a step movement but they will move to the new salary for their current step on the pay scales on 1 August and will be treated in line with the Pay and Grading policy
1 August – 31 January	Individuals joining before 1 February will be entitled to progress within the August pay scales, subject to satisfactory completion of their probationary period and overall performance assessment.

Change in role or manager part way through the year

For job holders who have been promoted or who have had their job re-evaluated part way through the year, reviewers should normally base their assessment on the job which has been held for the majority of the review period but, in any doubt, the reviewer will wish to discuss any issues with the countersigning officer.

In cases of change of line manager, the previous line manager should complete a 'break report', ie a review of the performance year up until that point. This review should be carried out as would any other review, including the provision of an indication of rating. This 'break report' is then passed to the new line manager. Line managers leaving HEFCW are also expected to complete a break report (i.e. complete MoPD form up until that point in time) for each of their staff before they leave HEFCW's employment.

Inputs from the previous manager must be taken on board and should be made in a fully transparent way, ie the job holder should be aware of the details of the feedback, should have an opportunity to discuss it face to face with the previous line manager, and the outcomes fully documented once this discussion has taken place.

Alternatively, the previous and new line manager can decide to hold a 'joint review': The previous line manager takes the lead in the review of the past few months, and leaves the new manager to take the lead in discussing the future learning and work objectives. In such cases the previous line manager and the new line manager must meet beforehand to ensure a common approach.

Poor performance

Occasionally, regardless of length of service, a job holder may not be performing effectively. If this is the case, their performance should be addressed as the difficulties arise and not be held back until the performance review. Action will need to be taken at the time to develop the job holder concerned and noted within the MoPD review as appropriate. In serious cases of under performance HR must be informed immediately and, in these cases, the category of 'unacceptable' should be used for the purposes of the annual performance review. Please refer to the Dismissal and Disciplinary Policy for further information on the process for managing poor performance.

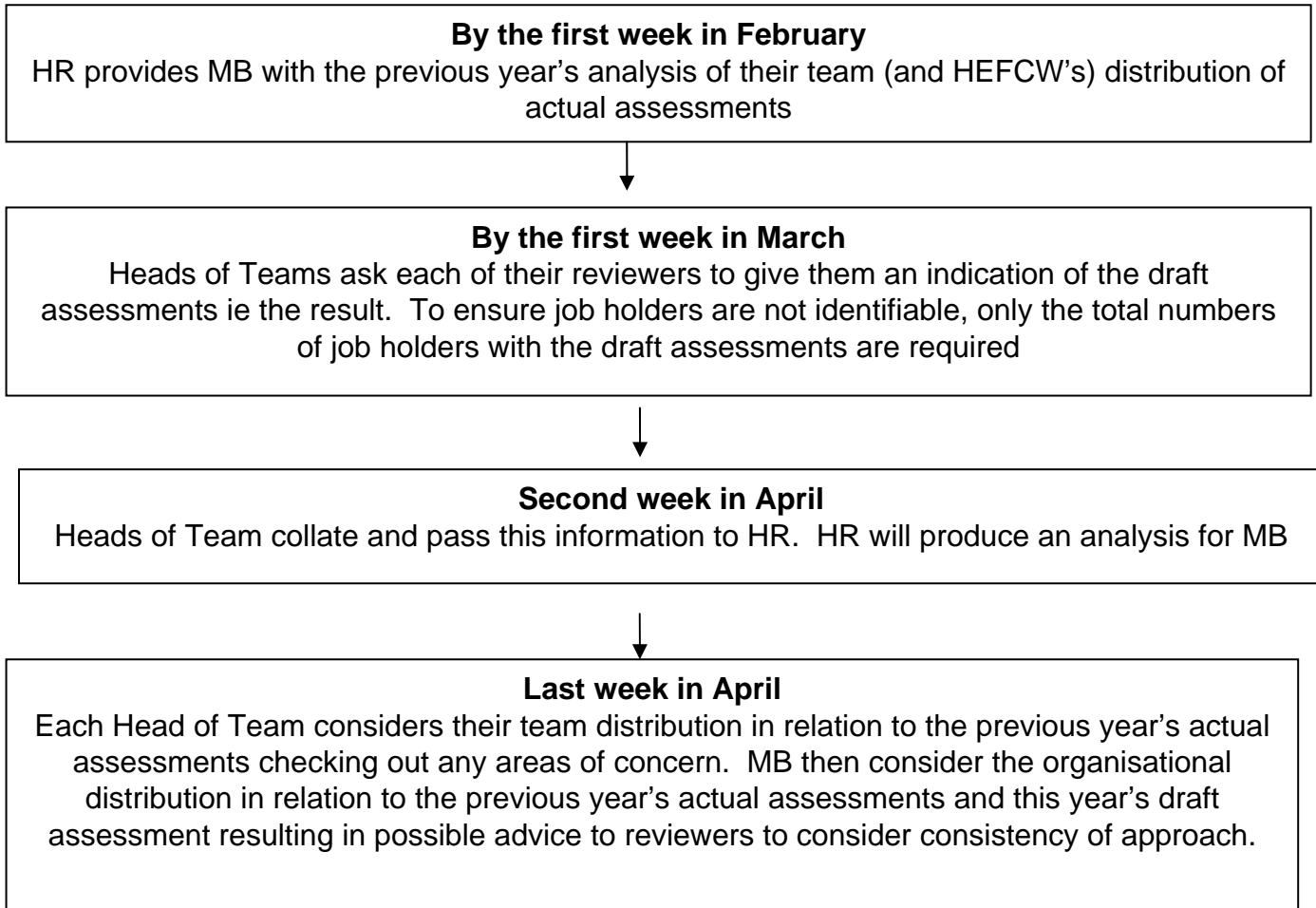
Where a job holder is potentially going to be rated as 'Unacceptable' (one) or 'Requirements met in part – scope for improvement' (two) (unless this is a new member of staff), this must be discussed with HR prior to any review meeting.

Consistency

Optimising consistency in the performance review system is a critical part of our commitment to diversity and equal opportunities and to being a good employer. Consistency alone is not enough - assessments can be consistent but flawed. The key parameters in terms of fairness are relative outcomes by individual, gender, part time/full time, pay band, age, disability and ethnic origin. A further key issue is to ensure that adequate arrangements are in place (and are seen by staff to be in place) to assure consistency of approach between Heads of Teams. Key ways to optimise consistency are:

- a comprehensive initial training programme;
- ongoing training and support.

The following steps will help to ensure that the process is managed consistently:



It is important to note that potential assessments can be changed in either direction following collection of appropriate feedback.

After each performance review round HR will publish statistics (within Data Protection laws) covering the outcomes of annual performance reviews.

NB Analysis will be produced as far as possible and will ensure no individual is identifiable. This may result in the analysis not being at 'team' level.

The role of the countersigning officer

- The countersigning officer is normally the reviewer's manager. This is important should the performance review score be challenged.
- The countersigning officer should have a discussion with the reviewer during February to discuss proposed ratings prior to the performance reviews taking place.
- The countersigning officer should ensure that the reviewer understands the system and that they are interpreting the assessment scale appropriately and consistently.
- The countersigning officer will coach and support the reviewer during the assessment process where required.

- The countersigning officer actively participates in the consistency checking process as described above.
- The countersigning officer will support the assessment review by adding their specific comments in the comments box for each job holder within their area of responsibility.

Appeals

If a job holder has any concerns about the performance review process and is unwilling to sign the end of year performance review form, the line manager should arrange for the job holder to discuss their concerns with HR. This meeting should be held within 10 days of the end of year performance review meeting.

If HR is unable to facilitate agreement and the job holder still feels unable to sign the end of year performance review, he or she should tick the 'Job holder wishes to discuss review' box on the last page of the MoPD form, add any comments he or she wishes to make and sign and date the request. The line manager should return the form to HR. If this box has been ticked HR will arrange for the job holder to meet with their Head of Team/ Director of Strategic Development / Director of Finance & Corporate Services, or the Chief Executive, as appropriate, within 10 working days of receipt of the form in HR to put their case. If, after the meeting, the job holder still wishes to appeal against the assessment he or she should invoke the grievance procedure.

Probation

When a new member of staff joins, the line manager must agree a Performance Plan for the probation period. Section seven of their plan should identify any initial training that the job holder will need to carry out the duties of the post during the period of probation. The performance plan should be reviewed and revised, if appropriate, at the probationary meetings (see Intranet for further details of the Probation policy).

Interim reviews

Purpose of interim reviews

The purpose of the two interim reviews is to give an opportunity for job holders and their line managers to:

- Review the key activities, objectives and values in the last four months
- Review any learning and development activities undertaken during the period and evaluate their impact
- Plan further learning and development activities (where required) and set further learning objective/s (to be reviewed at the annual performance review)
- Review and where appropriate update objectives
- Provide a summary of the last four months and detail this within the MoPD documentation.

Frequently Asked Questions

Q	What should I do if objectives are to be changed or amended part way through the year?
A	Document the amendments and provide a comment as to why this has changed. Comments are then detailed in the relevant section and/or detailed within the interim/final review as appropriate.
Q	What should I do if new training needs are identified?
A	New training needs should be noted on the Personal Development Section and priorities amended (as appropriate), signed by the line manager and job holder and forwarded to HR. Alternatively this can also be communicated via email from the job holder to the line manager and in turn emailed to HR
Q	Do I need to pass the interim reviews forms to HR?
A	No, the interim reviews are held with the line manager until the performance year end.
Q	Does third party feedback have to be obtained for the interim reviews?
A	No, it is not necessary to seek third party feedback for interim reviews, only the final review if applicable.
Q	Do I have to wait for my line manager to have their review before I have my review with my job holder?
A	Ideally it is best for reviews to cascade, however, if this means that job holders' reviews are delayed for a considerable period of time, it would be appropriate to undertake the review.
Q	If I leave or my line manager leaves part way through the year, what documentation needs to be completed?
A	The MoPD form needs to be completed in full, which will provide details of the performance for that period of time.
Q	If I have been unable to progress with an objective due to factors beyond my control how should this be reflected in the MoPD?
A	It would not be appropriate to mark this as a not met/part met, and depending on the actions the job holder has taken, it would be appropriate to mark them as a 'met' if they have done everything possible to progress the objective, but there were reasons beyond their control as to why this could not be achieved. If an objective has become obsolete it should be marked as N/A rather than not met/part met.

Annex 1

How the assessments may relate

The table below is provided purely as a guide. It will not cover every circumstance and there will be other combinations. Line managers will need to assess all the performance evidence and make a judgement as to which rating is appropriate for their job holder. There may be occasions for example, where a job holder may perform to a high standard in their key activities and objectives, but in doing so they do not approach their work with the values HEFCW expects, and this may have an adverse effect on their colleagues, their team, on HEFCW or on other stakeholders. In such circumstances, HR would strongly advise that their assessment is not assessed as 'exceptional', but is moderated down to a more appropriate category.

Assessment Area	High			Low	
Annual overall assessment	Exceptional (Box mark rating five)	Fully met, exceeded in one or more substantial areas (Box mark rating four)	Met (Box mark rating three)	Met in part (Box mark Rating two)	Unacceptable (Box mark rating one)
Key activity requirements	Exceeded	Met	Met	Part Met	Not Met
Objectives	Exceeded	Met	Met	Part Met	Not Met
Values	Demonstrated above expectations	Consistently demonstrated/ Demonstrated above expectations	Consistently demonstrated	Not always demonstrated	Not consistently demonstrated/ Not demonstrated
Quality	Excellent	Very good / good	Good	Requires improvement	Poor / requires improvement
Frequency	Consistently (80% of the time)	Consistently (80% of the time) / often (60-79% of the time)	Often (50-79% of the time)	Occasionally (30- 49% of the time)	Rarely or never (0-29% of the time)