



Form Introduction: Staff members are encouraged to complete this form *prior* to the performance feedback meeting with their supervisor. This will facilitate an interactive performance partnership discussion. Additional information and resources, including the [Competency Library](#), are located on the [Performance Partnership](#) web page.

Staff Member Name: Amelia Earhart

Staff Member SUID #: 101222333

Job Title: Budget Manager

Supervisor Name: Flying Jane

Section 1: Position Responsibilities

This section is used to record the major responsibilities for the position. If a [Performance Evaluation Request \(PER\)](#) form has been completed during the last year, you may enter that exact information here. If you need assistance, contact the [Human Resources Compensation team](#) or review the [PER instructions](#).

Major position responsibilities are being captured here to create streamlined job descriptions. This will create multiple process efficiencies and provide clarity for career path development for all staff members. These tools and processes are the foundation for talent management which will support the University’s commitment to attract, retain and develop the best talent.

List 5-7 major responsibilities for this position. Start each responsibility sentence with an [action verb](#) in the present tense.

	% OF TIME	MAJOR RESPONSIBILITIES
1	60	Manages the administrative and operational budget for departments within the division
2	15	Produces monthly budgetary forecasting reports utilizing Hyperion Planning System.
3	10	Directs, advises and instructs departmental administrative personnel regarding operating budgets, general ledger reports, purchasing policies and office management procedures.
4	5	Authorized signatory for departments in the division.
5	5	Independently makes strategic decisions and recommendations affecting planning, policies, practices and operations with regard to budgetary and financial matters.
6	5	Other position-related duties as assigned.
	100	

Section 2: Goal status since last review period

Document and assess your performance based on the previous performance review period.

Established Goals – List the goals established for the review period. Reference the Goals and Development Objectives documented in the previous year’s performance review form and/or the Goals and Development Worksheet as well as goals added since the review.

Status-Indicate the completion status in the drop-down box (choose either: completed, in-process, not started or no longer required) and provide supporting information in the “Impact” column if the goal was not completed.

Impact-Describe the impact the completed goal had on the department, school/college, or University. Make particular note if the completed goal improved the student experience.

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Competencies/Behaviors-Identify the competencies/behaviors you demonstrated that contributed to achieving the goal adding in brief detail where needed. Reference the [Competency Library](#) for a list and definitions of competencies/behaviors.

	ESTABLISHED GOALS	STATUS	IMPACT	COMPETENCIES/BEHAVIORS
1	Revise the travel reimbursement policy	In-Process	Still need to roll out to the department. Easier for staff to comply, less paperwork. Aligned with University Policy.	Problem Solving Attention to Detail
2	Benchmark best practices for purchasing equipment items over \$500	Completed	Saved University money. Used equipment is recycled and reused in other areas.	Innovation Problem Solving
3	Develop budget projections to address student employee minimum wage increase for each department within the division. Develop a plan to re-allocate funds to cover 10% payroll increase for the division's 200 affected student employees.	Completed	Saved the University money. Accommodated student wage increase without budget increase.	Quality Influence Planning and Organizing

Section 2b: Development/Opportunities for Improvement - Identify up to three competencies/behaviors that would have improved your performance. Document how the successful demonstration of that competency/behavior would have improved Performance Impact. When choosing the competency/behavior consider Major Responsibilities, (as outlined in Section 1), outcomes of stretch assignments preparing you for promotional opportunities, the direct impact to the department, school/college and/or University; and/or how this competency/behavior would have improved the student experience.

	COMPETENCIES/BEHAVIORS	PERFORMANCE IMPACT
1	Influencing	Changes to budget policy may have been more readily accepted. I would have been able to implement the changes more quickly and met my deadline.

Section 2c: General Summary Comments - Provide additional performance related comments not reflected elsewhere on this form.

I had a good year. It was challenging working with all the departments in our division to get them to support the changes we are making to the travel reimbursement procedues. It is gratifying to know that I am saving our division and the University money by improving the budget policies.

Section 3: Goals and Objectives

Draft up to three [SMART goals](#) and up to three SMART development objectives, for future accomplishments. SMART goals and development objectives are: Specific, Measurable, Achievable, Relevant, and Time-bound.

Section 3a: Goals result in tangible outcomes aligned with the position's Major Responsibilities as outlined in Section 1. Consider setting goals which improve the student experience, improve processes, enhance innovation, support University.

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fiscal objectives and/or reduce University risk. If resources and/or additional support are required, make certain to include in the action plan.

	GOAL	ACTION PLAN	COMPETENCY/BEHAVIORS	PLANNED COMPLETION DATE
1	Roll out the new travel procedures to the department. Complete the goal from last year.		Oral and Written Communication	July 1, 2016
2	Decrease the Overtime Budget.	Review current overtime practices and procedures for division and for each department. Create a new overtime protocol for hourly employees.		November, 2016

Section 3b: Development Objectives expand and/or improve skills, knowledge, and abilities which often result in improved performance and prepare you for long-term career goals or promotional opportunities. Examples may include training, taking a class, or serving on a committee. You may also want to consider Development/Opportunities for Improvement as outlined in Section 2b. If resources and/or additional support are required, make certain to include in the action plan.

	DEVELOPMENT OBJECTIVE	ACTION PLAN	COMPETENCY/BEHAVIORS	PLANNED COMPLETION DATE
1	Get more exposure to the University Budget process (not just our Division). Expand knowledge of University Budget Practices.	Serve on the University's Budget Committee.	Oral Communication Collaboration Technical Expertise	December, 2016

Section 4: Signature

Print this completed form, sign and send it to your supervisor prior to the Performance Partnership meeting. Email a copy to Human Resources at performance@syr.edu.

Staff Member Signature Amelia Earhart

Date March 15, 2016