Managing Projects

Planning, executing, and closing projects on time and within budget, while achieving the defined goals and objectives.

Does Not Meet Expectations	Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
• Work frequently does not progress according to a plan. • Decisions are made without appropriate stakeholder involvement. • Lack of appropriate planning leads to mismanagement of resources, adding undue costs to internal and external budgets. • Often unable to provide status reports in a timely manner due to a lack of involvement in the processes or update meetings. • Extensive rework is required due to misalignment of staff efforts and project goals. • Poor interdepartmental relationships cause confusion and inefficiency in project completion.	• Exhibits minimal project management skills. • Maintains general management of operational and support activities but misses opportunities to utilize project management fundamentals to better plan, execute, and communicate objectives. • Work often begins before the right people, processes, and tools are in place to ensure the project's needs will be met. • Communication to team members and stakeholders is often only reactive when issues arise. • Underdeveloped problem-solving skills lead to unidentified risks becoming project completion issues. • Projects are regularly completed but may miss defined budget or timeline goals.	• Displays elevated project management skills to define, execute, and implement initiatives within their operational environment. • Consistently identifies, analyzes, and manages stakeholder expectations. • Able to apply fundamentals to manage operational or support functions as if they were projects. • Employs a documented process to objectively prioritize requirements by urgency and importance while considering stakeholder needs and the overall effect the project has on the organization. • Performs as-is and gap analysis to accurately identify the needed requirements to ensure they will be met by the project. • Creates communication plans for project status updates and properly identifies the best method and frequency to ensure efficacy of communication.	• Demonstrates advanced project management skills that require significant collaboration with stakeholders outside of their own team. • Able to coordinate, record, monitor, and communicate results of tasks and efforts being completed by multiple teams. • Acts as a single figure of accountability for all phases of project completion. • Creates or implements agile processes with the ability to quickly and effectively respond to changing situations and needs as priorities shift. • Documents measurable milestones in project planning to ensure accountability while ensuring the timeline is achievable and realistic. • Able to identify and analyze risks and develop plans to prevent them from becoming issues.	• Displays expert project management skills. • Completes projects with predetermined budgets and varied stakeholders, ensuring alignment with business operations and strategic objectives. • Engages stakeholders in proactively offering suggestions and ideas to reach workable solutions for the project. • Avoids scope creep of projects by documenting requirements, being present for decision making, implementing consistent change management procedures, and managing stakeholder expectations. • Employs a sound estimating process to gather accurate information, conduct thorough analysis of variables, and create informed, realistic, and achievable estimates. • Regularly performs risk analysis using probability and impact to guide risk response planning efforts throughout all phases of the project.

12/11/2024

Financial Acumen

Understanding and applying financial concepts to make informed decisions that support the organization's financial health.

Does Not Meet Expectations	Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
• Consistently struggles to understand financial data, often leading to incorrect interpretations or poor recommendations. • Misunderstands key financial concepts or fails to align their suggestions with the team's financial goals, causing inefficiencies. • Lacks understanding of how their actions impact the organization's financial health and needs significant improvement in their understanding of budgeting and financial planning. • Unable to effectively interpret or utilize financial information to inform decisions, often causing delays or errors in budget management. • Lack of financial acumen can result in poor resource allocation, which may negatively affect the organization's bottom line.	• Limited financial acumen may struggle with interpreting complex financial data. • Handles basic budgeting tasks but often needs guidance to fully understand financial statements or trends. • Contributes to financial discussions with limited confidence, suggestions may lack the depth needed for strategic decision-making. • Struggles to understand financial implications. • Relays financial data as needed but lacks the ability to draw meaningful insights from it. • Makes budgetary decisions based on incomplete understanding, relying heavily on their team or higher management for detailed analysis. • Misses opportunities for cost savings or financial growth and may require coaching or further training to improve.	• Demonstrates financial basics, contributing to discussions around financial performance. • Understands standard financial reports and can identify general trends, though their insights may not be as detailed or forward-thinking. • Participates in budget planning and resource discussions and supports the team by aligning actions with the organization's financial priorities. • Manages budgets and financial processes adequately, using established tools and procedures to inform decisions. • May rely on more detailed analyses from finance teams but can interpret standard financial reports to guide day-to-day decisions. • Ensures that projects stay within budget, contributing to steady financial management without major innovations or risks.	• Shows strong proficiency in interpreting financial reports and frequently provides well-founded recommendations for resource allocation. • Identifies trends in financial performance and suggests measures to optimize costs or increase efficiencies. • Contributes meaningfully to financial discussions, showing a clear understanding of budgeting and financial outcomes. • Communicates financial information effectively to leadership, using financial analysis to highlight risks and opportunities. • Guides others in managing budgets and resources efficiently and often influences decisions that lead to financial stability. • Executes financial strategies aligned with organizational goals.	• Consistently goes beyond basic financial interpretation, offers insightful analyses that link financial performance to broader organizational goals. • Regularly identifies cost-saving opportunities and strategic investments, proactively guiding the team toward long-term financial sustainability. • Leads financial discussions with clarity and confidence, influencing team decisions. • Consistently anticipates financial challenges and opportunities, uses financial acumen to drive strategic business growth. • Interprets complex financial data, simplifying it for peers, and provides actionable insights that result in significant financial improvements. • Track record of creating financial forecasts that guide long-term planning and investments, earning trust and confidence from senior leaders.

12/11/2024

Customer Focus

Ensuring that customer needs and satisfaction are prioritized, driving business decisions and service delivery.

Does Not Meet Expectations	Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
• Demonstrates limited understanding of customer needs, providing solutions that do not align with customer expectations or organizational values. • Demonstrates poor understanding of company policies, leading to confusion or miscommunication with customers regarding what can or cannot be done to meet their needs. • Does not take proactive steps to ensure customer satisfaction, waiting for customers to raise complaints instead of anticipating their needs and addressing them ahead of time. • Fails to provide clear and accurate information to customers, leading to misunderstandings, errors, or mismanaged expectations, which negatively impact the overall customer experience.	• Does not regularly check in with customers after resolving issues, missing opportunities to assess the effectiveness of solutions or gather feedback for improvement. • Explains policies or procedures to customers clearly but fails to provide the broader context, which may leave customers with questions or confusion about how those policies apply to their specific situation. • Does not consistently recognize internal departments as customers, leading to occasional misalignment in priorities and delays in delivering the support needed for smooth interdepartmental operations. • Lacks a structured approach to anticipating the operational needs of various university partners, frequently reacting to issues instead of proactively addressing potential concerns.	• Regularly emphasizes the importance of customer focus to direct reports, encouraging a consistent approach to meeting customer needs and fostering a service-oriented mindset within the team. • Demonstrates a solid understanding of customer requirements, ensuring that products or services align with expectations. • Maintains effective communication with customers regarding any delays, issues, or updates, ensuring transparency and trust. • Regularly communicates with customers to gather feedback and identify areas for improvement in service delivery. • Responds to customer concerns with empathy and attentiveness, ensuring a positive experience in most interactions. • Takes appropriate action to resolve customer complaints or issues, achieving satisfactory outcomes in most cases.	• Effectively manages customer expectations by clearly communicating organizational policies, ensuring alignment between customer needs and unit capabilities, while maintaining a high level of customer satisfaction. • Cultivates strong, long-term relationships with customers by providing personalized attention and delivering value that aligns with their evolving needs. • Works effectively with other teams to ensure that customer needs are met, and that service quality is maintained. • Consistently takes ownership of customer experiences with a strong sense of accountability, ensuring that projects and services are delivered on time, to a high standard, and with a keen focus on meeting or exceeding customer expectations.	• Proactively collaborates with internal teams to understand their needs and provide timely, high-quality support, ensuring seamless interactions and contributing to the overall success of cross-functional initiatives. • Continuously seeks new ways to enhance the customer experience, taking innovative steps to solve problems and add value to customers' journeys. • Actions and communications portray consistency in brand message, ensuring every interaction with customers reinforces a positive and cohesive brand perception, ultimately strengthening customer trust. • Utilizes data-driven approaches to customer feedback that enable transformative changes in service offerings, allowing the organization to stay ahead of customer expectations and continuously improve their experience.

12/11/2024

Talent Management

Attracting, developing, and retaining top talent to ensure that the organization has the skills and abilities needed for success.

Does Not Meet Expectations	Needs Improvement	Meets Expectations	Exceeds Expectations	Outstanding
• Provides feedback only during the evaluation cycle, missing opportunities to offer real-time guidance and support, which hinders ongoing employee development and performance improvement. • Applies inconsistent methods for evaluating employee performance, leading to subjective assessments and potential bias in decision-making. • Does not consistently address poor performance and/or behavior, leading to unresolved issues and a lack of trust among team members. • Rarely engages with employees to understand their career development goals, resulting in missed opportunities for aligning their aspirations with organizational needs. • Fails to conduct structured interviews, resulting in poor hiring choices that do not align with organizational needs or values.	• Relies on a limited set of interview questions and fails to consistently assess both technical skills and cultural fit, leading to occasional mismatches between candidates and team needs. • Assigns employees to roles without fully considering their individual strengths and career aspirations, leading to disengagement or underperformance in some areas. • Does not regularly assess the talent pool for potential future leaders, leading to a lack of preparedness for critical leadership transitions or growth challenges. • Conducts appraisals that either produce flat profiles with minimal differentiation or create an excessive gap between high and low performers, hindering accurate development and recognition. • Provides feedback infrequently and lacks specificity, making it difficult for employees to understand how to improve or apply the feedback effectively.	• Conducts interviews using structured questions that align with job requirements, ensuring that candidates are evaluated consistently based on their skills and qualifications. • Matches employees to roles that suit their current skills and potential, ensuring that everyone's strengths are utilized to support team and organizational goals. • Identifies potential future leaders within the team and actively works with them to develop skills and experiences necessary for promotion or expanded responsibilities. • Uses established criteria and processes to evaluate employee performance fairly and consistently, ensuring that all employees are assessed against the same standards. • Consistently addresses performance and behavior issues, ensuring policies are not only enforced but that employees feel supported, fostering a respectful workplace that enhances team cohesion and productivity. • Provides regular feedback to employees, both positive and constructive, in a timely manner and with specific examples to guide future performance.	• Participates in talent development programs, identifying opportunities for skill development, and encourages employees to take on new challenges that match their career goals. • Even when delivering constructive feedback, the focus remains on motivating and guiding employees to meet organizational goals, offering concrete steps to help them overcome weaknesses while supporting their career development. • Uses data-informed performance metrics to measure talent effectively, ensuring that all performance evaluations are aligned with the organization's strategic objectives and growth plans. • Actively mentors high-potential employees, ensuring that their personal development aligns with the organization's long-term goals, and regularly reassess team structure to match evolving strategic priorities.	• Proactively identifies emerging talent within the organization, aligning individual career growth with future organizational needs, and ensuring a pipeline of leaders who will drive the company's long-term success. • Delivers feedback in a transformative manner, not only addressing current performance but also inspiring employees to innovate and take on leadership roles that directly contribute to achieving the organization's strategic goals. • Innovates and integrates advanced data analytics and performance management systems to ensure that talent assessments are not only aligned with the organization's objectives but also forecast future skill gaps, allowing for proactive development of high-potential employees. • Champions organizational values and guiding principles ensuring a safe, high-performing environment for all employees.

12/11/2024