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Memorandum To: MMI Employees
From: Lisa T. Ballance, Director MMI
Re: Biannual Strategic Meetings with MMI Faculty and Staff

The people of MMI are our greatest asset. More than a concrete set of projects or action items, my vision for our Institute is a mindset and an atmosphere that encompasses the place and the people in it, as much as the marine mammals and their ecosystems about which we are so passionate. I want us to share a common purpose that is deeply important. I want MMI to embody a culture that facilitates and values curiosity, innovation, diversity, teamwork, and employee development. I want our faculty, staff, and students to be productive, fulfilled, passionate, and working sustainably.

A key ingredient to facilitate this vision is regular communication that includes informal meetings and formalized reviews. I strongly believe that such communication contributes to fairness and transparency and provides a venue for deeper discussions to ensure our work remains aligned with University, Institute, and personal visions.

OSU has established policies and processes to guide formalized reviews for all types of employees:

[Guidelines for Periodic Review of Faculty](#)
[Performance Evaluation Management System \(EvalS\)](#)
HR guidance on [Professional Faculty Evaluation](#)
[Promotion & Tenure](#)

In synergy with OSU's formalized reviews, I would like to implement biannual strategic meetings between our supervisors and direct reports that incorporate an MMI-centric perspective. I have found that such meetings provide a valuable forum to set long-term goals, evaluate effectiveness, discuss job satisfaction, and revisit position descriptions. Ensuring that all MMI faculty and employees are included in this process is part of building and maintaining that shared purpose that binds us together as an Institute. Specifics:

- 1) The biannual strategic meetings will include a) a discussion of the past year and plans for the year to come, and b) a mid-year check-in. The former should occur annually near the change of the fiscal year (June/July). The latter should occur about six months into the fiscal year (January/February). Minda will send reminders to ensure that MMI remains loosely consistent with respect to this schedule.
- 2) Each of these two meetings should focus on high-level past accomplishments, and future goals and strategies (rather than more "in-the-weeds" details pertaining to a specific project or activity).
- 3) These biannual strategic meetings should be framed around accomplishments during the previous year, and goals and strategies for the coming year. As these are reflected in our Position Descriptions (PD), the PD provides an appropriate framework to guide this discussion.
- 4) These biannual strategic meetings can occur simultaneously with, or independently from, the formalized reviews associated with OSU policy, at the discretion of the supervisor. It is not my intent to duplicate or replace OSU's existing review processes. Instead, I encourage us to work within OSU's best practices and to enhance those with our own MMI mission, vision, and culture.

Thank you for your engagement with our Institute in this way.