**University of Oregon**

**Narrative Approach**

 **Human Resources**

 **Officer of Administration**

 **Performance Management Planning and Review Form**

1. **Officer of Administration Information:**

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| --- | --- | --- | --- | --- |
| Employee Name (Last, First) | UO ID# | Department | Position Title | Position Number |
| Performance Period | Discussion Date | Supervisor Name |

1. **Goals and Results:**

Please select **either** the (A) Management Review **or** the (B) Professional/Technical Review as appropriate.

1. Management Review: Use this section to evaluate OAs who manage a function and/or supervise staff. Please use the performance summary statements that follow as a guide in describing the overall performance of the OA.
2. Performance Goals: Consider results achieved for each major goal established last year. Jointly develop performance goals for the next review period. Identify areas for growth. If performance is in need of improvement, establish an improvement plan, including new goals as well as specific methods to improve performance in those areas that present challenges.
3. Leadership Effectiveness: Consider evidence of effective planning and decision-making, appropriate delegation, communication skills, interpersonal relations, ability to hire, develop and coach competent staff, ability to accomplish assigned objectives, flexibility, cooperation with colleagues, compliance with AAEO obligations and management of financial resources.

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| [Insert Narrative Here] |

1. Professional/Technical Review: Use this section to review OAs who do not manage or supervise but whose professional or technical skills are central to the operation of the department/unit.
2. Performance Goals: Consider results achieved for each major goal established last year. Jointly develop performance goals for next review period. Identify areas for growth. If performance is in need of improvement, establish an improvement plan, including new goals as well specific methods to improve performance in those areas that present challenges.
3. Professional Effectiveness: Consider the degree to which the OA demonstrates understanding all aspects of assigned work; carries out responsibilities with thoroughness, accuracy, attention to detail and a high quality and quantity of work; is committed to a high level of client/customer service; and demonstrates an understanding of organizational and political issues at work in his/her area of responsibility.

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| [Insert Narrative Here] |

1. **Job Knowledge and Skills:**

Consider the degree to which the OA demonstrates the required job knowledge and skills to effectively and efficientlycarry out job responsibilities.

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| [Insert Narrative Here] |

1. **Professional Competencies:**

Consider the degree to which the OA demonstrates a high level of dependability in all aspects of the job; is clear and concise in written and verbal communications; develops and fosters effective relationships within and outside the university; and is autonomous and a self-starter.

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| [Insert Narrative Here] |

**Diversity:**

Consider the degree to which the OA demonstrates commitment to the university’s diversity, equity and inclusion goals; has the ability to work with co-workers, students, and faculty, staff and community members from a wide range of cultural backgrounds; and treats others with dignity and respect.

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| [Insert Narrative Here] |

1. **Ethics**

Regardless of position, consider the degree to which the OA leads by example and maintains the highest ethical standards within his or her department and within the university; and the degree to which the OA complies with applicable university policies and procedures.

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| [Insert Narrative Here] |

1. **Summary Regarding Overall Performance**

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| [Insert Narrative Here] |

1. **Professional Development and Training**

In light of overall performance, areas for growth, needs of the department, and the OA’s professional objectives, consider professional development and training goals for the upcoming year.

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| [Insert Narrative Here] |

1. **Signatures**

Officers of Administration’s signature acknowledges receipt of the completed review; it does not necessarily indicate agreement.

Officer of Administration\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department Head\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_