**University of Oregon**

**Structured Approach**

**Human Resources**

**Officer of Administration**

**Performance Management Planning and Review Form**

1. **Employee Information**

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

1. **Performance Factors**

Please rate the OA on each performance factor based on the statements provided. For ratings DNM please use the “Comments” section to explain performance concerns. If the performance factor is not relevant to the employee’s position, use the rating N/A. Please attach additional sheets or documentation if necessary.

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| --- | --- | --- |
| **(E)**  **Exceeds Expectations** | **(M)**  **Meets Expectations** | **(DNM)**  **Does not meet Expectations** |
| Performance frequently exceeds requirements with minimal direction. Performs task and/or function consistently in a timely manner at a very high quality level. | Performance fully meets job requirements on a consistent basis. | Performance frequently does not meet expectations. Improvement is necessary. |

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| **PERFORMANCE FACTORS** | **Rating** |
| **Job Knowledge and Skills:** | |
| * Demonstrates an understanding of concepts, methods, techniques and principles necessary to accomplish job duties. |  |
| * Keeps current on technical matters and professional development in his/her area; Responds accurately to inquiries. Consults with others and uses resources appropriately. |  |
| * Demonstrates knowledge of inclusive practices and respectful workplace expectations. | |
| Comments: | |
| **Judgment, Problem Solving, and Decision Making:** | |
| * Identifies priorities and acts on them. |  |
| * Takes initiative in identifying and researching problems. Develops appropriate and creative solutions and selects the best course of action. Takes action in a timely manner after considering critical factors. |  |
| * Adheres to professional ethics and best practices. |  |
| * Problem solving reflects innovation and creativity. |  |
| * Demonstrates sound judgment. |  |
| Comments: | |
| **Communication:** | |
| * Listens actively. |  |
| * Accepts and offers feedback constructively. |  |
| * Develops clear, concise and complete written materials. |  |
| * Shares information as needed and in ways that promote collaboration. |  |
| * Understands and is responsive to differences in communication styles based on cultural or other factors. |  |
| Comments: | |
| **Planning and Productivity:** | |
| * Completes assignments and projects within a specified time frame. Consistently meets deadlines. |  |
| * Organizes and prioritizes appropriately. |  |
| * Delegates work when appropriate. |  |
| * Consults with supervisor regarding workload as necessary. |  |
| Comments: | |
| **Financial and Resource Management:** | |
| * Works within budgets to meet operating objectives. |  |
| * Utilizes university resources effectively to minimize and control expenses. |  |
| * Thinks strategically regarding financial management. |  |
| Comments: | |
| **Relationships with Customers, Colleagues, and Coworkers:** | |
| * Provides excellent customer service and understands the importance of responding courteously and promptly to all internal and external customers. |  |
| * Exhibits the ability to adapt to differences in personalities, work styles, and cultures. |  |
| * Works in a positive, supportive and respectful manner with students, staff, faculty, other departments and the public. |  |
| Comments: | |
| **Adherence and Support of University Policies and Procedures:** |  |
| * Understands and consistently adheres to university policies and procedures. |  |
| * Complies with university policies and applicable federal and state laws and regulations. |  |
| * Consistently practices and promotes a safe working environment in compliance with the employee safety guidelines. |  |
| Comments: | |

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| **PERFORMANCE FACTORS: Position Specific** | **Rating** | |
| **Leadership and Supervisory Skills (for OAs who supervise):** | | |
| * Trains and supports employees effectively. | |  |
| * Provides ongoing positive and critical supervisory feedback as appropriate. | |  |
| * Conducts annual performance reviews for all subordinates. | |  |
| * Leads by example and maintains the highest ethical standards within the department and within the university. | |  |
| * Demonstrates commitment to and leadership for the university’s diversity, equity and inclusion goals. | |  |
| * Seeks professional development opportunities for self and supports such opportunities for subordinates. | |  |
| Comments: | | |
| **Strategic Leadership (for executive level OAs):** | |  |
| * Clearly Identifies vision and priorities. | |  |
| * Connects unit vision and goals to university vision and goals. | |  |
| * Provides clear direction. | |  |
| * Effectively addresses difficult issues. | |  |
| Comments: | | |

1. **Additional Comments:**

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| --- |
| Specific contributions and achievements not previously mentioned: |
| Improvement opportunities: |
| Professional development and training recommendations: |
| Other comments: |

1. **Performance Goals**If you would like to include goal review and development, please complete the Goals Addendum.
2. **Overall Performance Rating:** Mark the overall rating that best reflects combined performance and results.

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| --- | --- | --- |
| Exceeds Expectations | Meets Expectations | Does Not Meet Expectations |
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1. **Signatures**

Employee’s signature acknowledges receipt of the completed evaluation. It does not indicate agreement with the contents. The employee may include their own comments to rebut, correct, amplify or explain any content in their performance evaluation by using the OA Performance Evaluation Employee Comment form.

* Please check here if using the OA Performance Evaluation Employee Comment form and attach the completed form to this evaluation

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

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

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