University of Oregon

**Goals and Results Approach**

**Human Resources**

**Officer of Administration**

**Performance Management Planning and Review Form**

1. **Officer of Administration Information**

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

1. **Goals and Results**

**Planning:** 1) Enter department or unit goals. 2) List individual performance goals (linked to department goals where applicable). 3) List the performance indicator(s) that will be used to measure success in attaining each goal.

**Review:** 1) Assign a rating for each goal based on results achieved against the performance indicators. 2) Assign an overall rating for this section. 3) Enter comments on the results achieved, providing examples for high and low ratings.

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| **University of Oregon Mission:** The University of Oregon is a comprehensive research university that serves its students and the people of Oregon, the nation, and the world through the creation and transfer of knowledge in the liberal arts, the natural and social sciences, and the professions. (University of Oregon Mission Statement 2007) | | |
| **Department/Unit Goals** | | |
| **Individual OA Performance Goals** | **Performance Indicator (Metric)** | **Year-end Review and Comments:**  **Below Meets Exceeds** |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| **Overall Rating for Results**  Place an “X” along the continuum to indicate overall performance in achieving results,  taking into consideration the individual ratings above and the relative importance of each goal.  (You will need to manually place the “X” once the document is printed) | | |
| **Overall Year-end Comments** (optional; however, examples required for high and low ratings) | | |

1. **Competencies**

**Planning:** 1) Discuss how the competencies apply to the OA’s position, including the relative importance of each

**Review:** 1) Assign a rating for each competency based on the extent to which the competency (behavior) is displayed. 2) Assign an overall rating for this section. 3) Enter comments, including reasons for high and low ratings.

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| --- | --- |
| **Competency** | **Year-end Rating and Comments**  **Rarely Often Always** |
| **Commitment to Service and Results:** Displays a high level of energy and initiative in providing service and pursing goals. Works hard to achieve and surpass internal and external customer service needs. Operates independently. |  |
| **Innovation/Quality Improvement:** Generates new ideas and uses these ideas to develop improved processes, methods, systems or services that produce university or department benefits. |  |
| **Teamwork:** Develops and fosters effective relationships within and outside of the university. Understands and appreciates the diverse perspectives and nature of others. Treats others with dignity and respect. |  |
| **Dependability:** Displays good work habits. Demonstrates a high level of dependability in all aspects of the job. Fulfills commitments made to others. Complies with applicable laws and university policies and procedures. |  |
| **Communications:** Is clear and concise in communicating thoughts and information through written and verbal communications. Is an active and effective listener. |  |
| **Job knowledge and Skills:** Demonstrates understanding of the required job knowledge and skills to effectively and efficiently carry out job responsibilities. |  |
| **Managing Others (for supervisory personnel):** Hires, develops and retains successful employees; provides effective coaching and facilitates skill development. |  |
| **Strategic Leadership (for executive-level OAs):** Initiates and manages strategic and operational planning initiatives for portfolio of responsibility. Develops and takes responsibility for achieving university-wide and department goals. Sets priorities and provides clear direction. Addresses difficult issues. |  |
| **Ethical Standards:** Leads by example and maintains the highest ethical standards with the department and within the university. |  |
| **Commitment To AA/EEO:** Demonstrates commitment to and leadership for the university’s affirmative action and equal opportunity goals and plans and the university’s commitment to diversity. |  |
| **Overall Rating for Competencies**  Place an “X” along the continuum to indicate overall rating for competencies,  taking into consideration the individual ratings above and the applicability of each competency.  (You will need to manually place the “X” once the document is printed) | |
| **Overall Year-end Comments** (optional; however, examples required for high and low ratings) | |

1. **Summary and Development Plan**

**Review:** Summarize key accomplishments, improvement opportunities and challenges to be faced in the next review cycle. Identify top strengths and development needs. Summarize development plan to leverage strengths and provide growth and development opportunities.

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| --- | --- |
| **Performance highlights [year-end review highlights]** | **Summarize strengths** |
| **Improvement opportunities** | **Professional development and training recommendations** |
| **Challenges for the next review cycle** | **Development or improvement actions (if applicable)** |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Overall Performance Rating:**  Mark the overall rating that best reflects the combined performance on competencies and results. | Unsatisfactory | Partially meets expectations | Fully  Successful | Exceeds  expectations | | |

1. **Signatures**

Officer 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:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_