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| *Julia Paternain* | Project Manager | 1/1/24 – 12/31/24 |
| Employee Name | Job Title | Performance Cycle |

Performance management helps employees reach goals that support OHIO’s vision of being *“the nation’s best transformative learning community where students realize their promise, faculty advance knowledge, staff achieves excellence, and alumni become global leaders.”* Individual goals are set at the beginning of the performance cycle and discussed several times during the year (refer to **“Writing Performance Goals” Tip Sheet** for help in writing goals). Performance evaluations are done at the end of the cycle to discuss goal achievement, behaviors demonstrated during the year, and future development opportunities.

**Employee:** Review job description and department goals with Supervisor. Enter 3-5 individual goals below, review progress with supervisor periodically throughout the year, and update goals as required. At the end of the cycle, provide comments and select one of the ratings in the dropdown list for each goal.

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| Job description reviewed and Individual Goals Acknowledged on: |  |

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| Check in 1 |  |
| Check in 2 |  |
| Check in 3 |  |

Review and use rating scale below for goal ratings:  
**Did not meet expectations:** Little to no progress was made, results were significantly below expectations.   
**Inconsistent:** Some progress made, but overall results were below expectations.   
**Effective:** Goal was achieved and results fully met expectations.  
**Distinctive:** Goal was achieved and results significantly exceeded expectations.

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| **Goal 1:** | Complete the Northwestern asynchronous clinical research coordinator course by September 30, 2024. |
| Self-Assessment: |  |
| Self Rating: | Use rating scale above |
| Supervisor Comments: |  |
| Supervisor Rating: | Use rating scale above |

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| **Goal 2:** | Complete one IRB submission in the new Cayuse platform by December 31, 2024. |
| Self-Assessment: |  |
| Self Rating: | Use rating scale above |
| Supervisor Comments: |  |
| Supervisor Rating: | Use rating scale above |

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| **Goal 3:** | Complete at least 3 trainings for collaborative project management software/platforms (e.g., Klaxoon or Smartsheet) by June 30, 2024. |
| Self-Assessment: |  |
| Self Rating: | Use rating scale above |
| Supervisor Comments: |  |
| Supervisor Rating: | Use rating scale above |

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| **Goal 4:** |  |
| Self-Assessment: |  |
| Self Rating: | Use rating scale above |
| Supervisor Comments: |  |
| Supervisor Rating: | Use rating scale above |

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| **Goal 5:** | Meeting with investigators to |
| Self-Assessment: |  |
| Self Rating: | Use rating scale above |
| Supervisor Comments: |  |
| Supervisor Rating: | Use rating scale above |

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**Employee:** Reflect on your achievements, review core behaviors, and provide a few examples of how these behaviors were demonstrated. Summarize what went well, what you would do differently, and what you want to focus on for future development.

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| *Employee comments regarding overall performance and future development:* |
| Enter comments here |

**Supervisor:** Review self-assessment, rate each goal, and provide comments to support your ratings. Review Core Behaviors and indicate to what extent they were demonstrated throughout the year. The “Leading Others” category only applies to employees who supervise others.

**Core Behaviors**

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| **IR=Improvement Required** | | **DE= Demonstrated Effectively** | | **SS=Significant Strength** | |
|  | |  | |  | |
|  |  | |  | | Rating |
| **Team Accountability** | * Assumes personal responsibility for team effectiveness * Partners effectively with others to solve problems * Holds self and the team accountable for compliance | | * Interacts with others to promote a sense of community * Readily shares relevant information and expertise * Competently performs job duties to support team goals | |  |
| **Excellence** | * Models initiative, innovation and continuous improvement * Communicates clearly, thoughtfully, and constructively | | * Reliably plans and delivers high-quality work on-time * Maintains high level of relevant job-related knowledge | |  |
| **Civility** | * Treats others with respect and professionalism * Demonstrates a courteous and approachable demeanor | | * Service-oriented, works to make things better for others * Effectively deals with set-backs and frustration | |  |
| **Integrity** | * Acknowledges mistakes and strives to learn from them * Demonstrates openness, honesty and trustworthiness | | * Delivers on commitments, is dependable * Responds to concerns in an effective and timely manner | |  |
| **Diversity** | * Respects and values differences in others * Actively seeks to understand other points of view | | * Works to build a collaborative, supportive environment * Open-minded and flexible when dealing with change | |  |
| **Stewardship** | * Uses data and best practices to make informed decisions * Demonstrates behaviors in-line with university values | | * Responsibly manages university resources * Appropriately prioritizes work, manages time efficiently | |  |
| **Leading Others** | * Aligns individual efforts with department/university goals * Recognizes contributions and achievements * Appropriately communicates vision and expectations | | * Provides frequent, timely and constructive feedback * Encourages involvement and open communication * Actively pursues and supports professional development | |  |

Summarize performance highlights, including examples of behaviors that were significantly above or below expectations. Identify future focus areas, then provide an overall rating.

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| *Supervisor comments regarding overall performance:*    *Future focus and development opportunities:* |

Review and use rating scale below for overall rating:  
**Did not meet expectations**: Employee routinely does not meet expectations and/or is modeling inappropriate behaviors for the position.   
**Inconsistent:** Employee does not consistently meet performance objectives and/or does not consistently demonstrate behaviors essential for the position.  
**Effective:** Employee meets or exceeds key goals for and demonstrates most essential behaviors for the position.  
**Distinctive:** Employee makes a major positive impact on the department, organization, or university, and models all essential behaviors for the position.

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| **Overall Rating:** |  |

Signatures acknowledge that this evaluation was reviewed with Employee and a copy was made available. This evaluation will be part of Employee’s personnel file.

If using Performance Evaluation workflow for approvals (link), signatures not needed.   
If submitting directly to planning unit head, please include signatures and dates below.

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| Employee Signature | Date | Supervisor Signature | Date |
|  |  |  |  |
| 2nd Level Reviewer Signature | Date |  |  |