

University of Oregon
Human Resources
Officer of Administration
Performance Management Planning and Review Form

Structured Approach

Performance Factor Avg.

1. Officer of Administration Information

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

2. Performance Factors

Please rate the OA on each performance factor based on the statements provided. For ratings of "0" or "1", which indicate below standard performance, please use the "Comments" section to explain performance issues. Please attach additional sheets or documentation if necessary.

(4) Consistently Exceeds Requirements	(3) Frequently Exceeds Requirements	(2) Fully Meets Requirements	(1) Does Not Consistently Meet Requirements	(0) Below Minimum Standards
Performance consistently exceeds requirements. With minimum supervision and/or direction, achievements are well beyond those expected at this level.	Performance frequently exceeds requirements. Performs the task and/or function consistently in a timely manner at a very high quality level. Initiates and/or volunteers.	Performance fully meets job requirements on a consistent basis.	Performance sometimes meets requirements, but not consistently; improvement necessary.	Performance below minimal acceptable standards; immediate improvement required.

Performance Factor	Rating
Job Knowledge and Skills: <ul style="list-style-type: none"> • Demonstrates an understanding of concepts, methods, techniques and principles necessary to accomplish his/her job duties or lead the work of others. • Keeps current on technical matters and professional development in his/her area; participates in committees and professional groups as necessary. • Responds accurately to inquiries. Consults with others and uses resources appropriately. 	<div>—</div> <div>—</div> <div>—</div>
Comments:	
Judgment, Problem Solving, and Decision Making: <ul style="list-style-type: none"> • Identifies key issues to be addressed. Prioritizes well. • Takes initiative in identifying and researching problems. Develops appropriate and creative solutions and selects the best alternative course of action. Takes action in a timely manner. • Makes decisions in a timely manner after considering all of the factors; consults with and shares information as appropriate. • Decisions and actions reflect adherence to professional ethics and best practices. 	<div>—</div> <div>—</div> <div>—</div> <div>—</div>
Comments:	
Communication: <ul style="list-style-type: none"> • Demonstrates effective oral communication skills. Effectively listens to others, facilitates group discussions, and/or contributes in a positive and supportive manner. • Develops clear, concise and complete written materials. • Shares information appropriately. • Is sensitive to differences in communication styles based on cultural or other factors and responds appropriately. 	<div>—</div> <div>—</div> <div>—</div> <div>—</div>
Comments:	

Performance Management Planning and Review Form

Planning and Productivity: <ul style="list-style-type: none"> • Completes assignments and projects within a specified time frame. Consistently meets deadlines. • Identifies short- and-long term goals, initiates programs or projects, organizes and prioritizes appropriately. • Delegates work when appropriate. Consults with his/her supervisor regarding the department workload as necessary. 	
Comments:	
Financial and Resource Management: <ul style="list-style-type: none"> • Plans for current and future needs (space, budget, staff, supplies, equipment, etc.) • Works within budgets to meet operating objectives. Utilizes university resources effectively to minimize and control expenses. • Oversees efficient utilization of supplies, equipment, and other resources so as to control costs while maintaining and improving service. 	
Comments:	
Relationships with Customers, Colleagues, and Coworkers: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • Promotes the university's diversity initiatives and complies with AA/EEO goals. • Complies with university policies and applicable federal and state laws and regulations. • Consistently practice and promote a safe working environment in compliance with the employee safety guidelines. 	
Comments:	
Leadership and Supervisory Skills (applicable to OAs who supervise): <ul style="list-style-type: none"> • Recruits, selects, develops and trains employees effectively. • Provides ongoing supervisory feedback, including complying with requirements to conduct regular performance reviews. • Directs the work of others to achieve optimum productivity. Solicits feedback for employees on an ongoing basis. • Consistently elicits support and cooperation from others when presenting ideas and concepts. Facilitates group processes to accomplish goals. Demonstrates the ability to persuade others to cooperate in achieving goals. • 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 affirmative action and equal opportunity goals and plans and the university's commitment to diversity. 	
Comments:	

3. Optional Goals or Objectives:

In addition to the performance factors provided, an optional “Goals or Objectives” section is included for assessing performance on specific department or individual goals or objectives.

Goal or Objective	Results
1.	
2.	
3.	
4.	

4. Additional Comments:

Specific contributions and achievements:
Improvement opportunities:
Professional development and training recommendations:
Other comments:

5. 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: _____