



#PM1

PERFORMANCE MANAGEMENT REVIEW FORM

It is the policy of Ohio University that all employees receive a periodic performance evaluation from their immediate supervisor. Please refer to policies 40.005 Performance Evaluation Program Administrative Presidential Appointees and 40.042 Performance Evaluation Program Classified Employees for policy descriptions, guidelines and appeal procedures.

Employee's Name: Addie Minister

Title: Administrative Assistant

Role: Administrative/Technical Professional Manager

Check One: Probationary Annual

Department: Community Services

Supervisor's Name: N. Connie Plaint

Review Period: 2002 - 2003

Date of Review: 6-Jun

This is the annual Performance Management Review form for classified and IT employees at Ohio University. The written performance review and the subsequent conversation should focus on the employee's job performance and achievement of goals as identified during the performance planning meeting held at the beginning of the performance management cycle. The seven performance competencies below guide the performance management review:

- Customer Focus
- Teamwork
- Respect for Others
- Performance Initiative
- Application of Knowledge
- Innovation and Managing Change
- Performance Management and Development

Instructions:

- Please refer to the individual's official position description to assist in assessing and evaluating his/her job performance.
- The criteria for each of the competencies are listed on pages 2 and 3 of this form. Please refer to http://www.ohiou.edu/comp/index_perfm.htm for detailed descriptions, help, and tools.
- Use a checkmark on the continuum to mark the employee's rating.

Part I - Accomplishments

List the objectives or key accomplishments for the previous evaluation period, including ongoing assignments which met expectations/standards; areas of improvement; development of new skills; etc. Using the columns as a guide, indicate how you measured and defined success and progress towards established goals and objectives. Additional sheets may be attached.

Goals & Objectives Met	Method of Measurement	Results
Learn to use PARIS system.	Learned the PARIS screens.	Kept up-to-date records.
Assign correct account numbers to credit card charges	Balanced budget.	No change of accounts needed.
Improve communication with my co-workers over the next year.	Met with co-workers weekly.	Better office coverage.
Make referrals to other departments.	Directed questions to other areas.	Freed up my time for other things.

Part II - Ohio University Competencies

Part II lists the competencies expected of all employees. For a detailed description of each of the competency performance levels, refer to http://www.ohiou.edu/comp/index_perfm.htm

Please mark a checkmark along the rating line and provide additional comments for each item. Comments should emphasize skills and behaviors that have contributed to an employee's performance. Include comments about areas for specific learning and development for performance improvement.

Customer Focus – Consistently meets the needs of internal and external customers.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
Takes the minimum action necessary to meet customer expectations		I tell people where to go to get the information they want.

Teamwork – Collaborates within and across work groups, building and maintaining rapport and cooperation with co-workers to meet the needs of customers.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
Gets along well with co-workers.		I enjoy organizing the office social functions.

Respect for Others – Demonstrates respect for people from a variety of ethnic, social and educational backgrounds by interacting in a civil and sensitive manner.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
You worked hard to include all employees in the office functions.		I initiated weekly staff meetings.

Performance Initiative – Continuously takes self-motivated steps toward achieving organizational goals.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i> I had to continually check that your work was getting completed on time.	<i>Employee's Comments</i> There is such a heavy work load in this job, that I have enough to do just keeping up.	

Application of Knowledge and Continuous Learning – Effectively applies current knowledge and skills and keeps abreast of new knowledge and developments in one's areas of responsibility.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i> You learned how to view p-card transactions in PARIS.	<i>Employee's Comments</i> It's fun to learn new things on the computer.	

Innovation and Managing Change – Readily adapts to change, demonstrates a willingness to learn, and seeks new ideas to apply for positive results.

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i> You handled changes well.	<i>Employee's Comments</i> I don't like doing the same thing all the time.	

Performance Management and Development- Uses the performance management program effectively to develop and improve personal job performance (and that of others, where appropriate).

X		
<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
<i>Supervisor's Comments</i> You attended training workshops when offered.	<i>Employee's Comments</i> Some were pretty boring, but I felt I needed to go to get a good rating on my performance.	

Part III - Overall Performance: Consider the scope of the job, as well as any exceptional circumstances under which the employee worked during the evaluation period. What goals were achieved? What responsibilities were fulfilled? If the employee did not meet or exceed expectations, provide an explanation. Mark the overall rating along the rating line at the bottom of this section.

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	x <i>Exceeds Expectations</i>
<i>Supervisor's Comments</i> You met all the goals that were set at the beginning of the year. I wasn't sure you would or could. So I'm giving you an exceeds expectation rating.	<i>Employee's Comments</i> That's great. Thanks!	

Part IV - Goals

Discuss and list the major goals to be included in the performance management planning meeting for the next evaluation period.

1. Continue what you've been doing and we'll see what else needs to be done.
2. Attend training in the areas that you need.
3. Keep the customers happy.

I certify that my supervisor has discussed this document with me. My signature does not necessarily imply that I agree with this evaluation.

Signature of Employee: _____ **Date:** _____

Signature of Supervisor: _____ **Date:** _____

I certify that I have read the contents of this document and discussed them with the employee's supervisor.

Signature of Supervisor's Supervisor: _____ **Date:** _____

- Employee
- Supervisor
- Supervisor's Supervisor
- UHR (Classified forms only)
- Department (Administrative forms only)