



#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:** Connie Pliant

**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](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
Learned PARIS system for p-card transactions	Ability to independently navigate the PARIS screens.	All PARIS transactions current.
Verify transactions and correctly assign expenditures within department budget	Ability to reconcile monthly accounting reports.	All transactions mapped to correct accounts.
Improve communication with co-workers by discussing weekly issues that arise from inquiries	Implemented weekly office staff meeting.	Improved cross training and back-up support within the unit.
Develop resource listing of department and office referrals to use when customers need information from other sources	Development of resource handout.	Improved customer service and satisfaction.

## 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](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.

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
Will help customers when asked, but do not go out of your way to address questions and inquires. The resource manual needs to be more complete.		Customer questions interrupt my train of thought or concentration on a project. I don't always have the answers they're looking for.

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

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
	X	
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
You have a good rapport with your co-workers and are willing to cover others responsibilities when they're not available.		I believe my co-workers appreciate my willingness to cross-train with their positions. I am glad to help out when necessary.

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

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
	X	
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
You made an extra effort to schedule the office meetings at a time that was convenient to all.		It was not an easy task to coordinate everyone's schedule, but I felt it was necessary to accommodate all the staff.

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

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>	<i>Employee's Comments</i>	
I found it necessary to continually remind you of deadlines and outstanding assignments. Perhaps a workshop on time management would improve your performance in this area.	I tend to have tunnel vision when it comes to a particularly interesting project that I'm working on, and lose sight of the big picture. I would welcome additional coaching in this area.	

**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.

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>	<i>Employee's Comments</i>	
You quickly learned and became proficient in the PARIS system. This was an enormous benefit to the unit.	I was delighted when you asked me to take on this additional responsibility. I am glad I was able to make a positive contribution to the unit.	

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

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>	<i>Employee's Comments</i>	
You were asked to learn new procedures and accepted the responsibility with enthusiasm. I was very pleased with your attitude.	Dealing with change and the new responsibilities are what keep the job interesting.	

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

<i>Falls Below Expectations</i>	<i>Meets Expectations</i>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>	<i>Employee's Comments</i>	
You took advantage of the opportunities as they were offered. All this development makes you a more valuable employee to the unit.	I must admit not all the sessions were of interest to me, but I felt if I was able to gain at least one piece of new information, the time spent was worth the effort.	

**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>	<i>Exceeds Expectations</i>
X		
<i>Supervisor's Comments</i>		<i>Employee's Comments</i>
You attempted to meet all the goals that we agreed upon at the beginning of the year. We have established a good working relationship that enhances the mission of our unit.		Knowing ahead of time what the goals and expectations were made it much easier to achieve results that were expected of me. I look forward to another successful year.

**Part IV - Goals**

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

1. Learn the new Financial Management System including account number conversions, new forms, and report access in the Oracle system
2. Attend training for time management and implement new techniques in your everyday responsibilities
3. Continue to update and expand the manual of resource information and handouts to assist you in dealing with customer inquiries and needs

*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)