

Performance Review Form Instructions

Use Google Chrome. Go to talent.okstate.edu and hover over the “performance review” tab to begin.

If employee is Classified (non-exempt) and began employment with OSU before March 1, you should complete the 90-Day Probation Evaluation **before** the end of 90 days AND an Annual Performance Review. If employee began employment with OSU after March 1, you will only need to complete the 90-Day Probation Evaluation for that year.

Ratings Scale:

5 = Consistently Exceeds Job Requirements - *Consistently* achieves highest level of performance in this particular aspect of job.

4 = Frequently Exceeds Job Requirements - *Often* achieves highest level of performance in this aspect of job.

3 = Fully Meets Job Requirements - Consistently performs at an *expected and satisfactory level*.

2 = Needs Improvement - Meets *some* requirements of this aspect of job, but is inconsistent and needs improvement.

1 = Unsatisfactory - *Does not meet* expectations in this aspect of job. Must improve or face serious corrective action.

Use the ratings scale above to enter ratings of 1-5 as indicated in each section. On the Staff Performance Review there is one rating for the core values, one rating for responsibilities, one rating for behaviors and if applicable one rating for supervisory skills. Then there is one overall rating (average of all scores).

On the Faculty Performance Review there are NO ratings. Employee and supervisor will enter a narrative along with goals for the upcoming year.

Core Values:

The employee and the supervisor must each provide a summary about the employee’s performance as it relates to the OSU Core Values defined below. The supervisor will input one rating for all of the core values. Support the rating with specific examples observed over the past year.

Stewardship of Resources - Uses University resources wisely and encourages others to do so, as well; accepts individual responsibility for actions that affect institution; pursues opportunities to deliver services more efficiently and effectively.

Integrity - Committed to principles of truth and honesty; straightforward, forthright and appropriate in communications; keeps confidences; admits mistakes; widely trusted; honors commitments and promises; upholds the highest ethical conduct.

Respect for Diversity – Seeks opportunities to learn and understand other cultures; celebrates and appreciates differences; respects different opinions; seeks to understand before acting.

***Service to Others** – Anticipates the needs of others; provides prompt and courteous service with a positive attitude; takes pride in what he/she does.

Excellence and Continuous Self-Improvement – Seeks excellence in all endeavors; embraces change; recognizes personal strengths and weaknesses and strives for improvement; seeks improvements in

processes and services; demonstrates positive safety behaviors; cultivates a passion for life-long learning; attends required training such as Safety, HIPAA, FERPA, Ethics, and Sexual Harassment.

Major Responsibilities of Position:

The employee will enter a brief description of the major responsibilities of his/her position. Supervisor validates.

The employee and the supervisor must each provide a summary about the employee's performance as it relates to the major responsibilities of the position. The supervisor will input one rating for the performance on all of the major responsibilities. Support the rating with specific examples observed over the past year.

***Behaviors:**

The employee and the supervisor must each provide a summary about the employee's performance as it relates to the OSU Behaviors defined below. The supervisor will input one rating for all of the behaviors. Support the rating with specific examples observed over the past year.

Initiative and Dependability - The ability to use sound judgment to make decisions appropriate to job level; knows what needs to be done and does it without step-by-step instructions and reminders. Demonstrates positive safety behaviors. Can be relied upon to complete assignments in a timely manner; demonstrates consistent attendance at work.

Listening and Communication - Practices active listening; has patience to hear people out; can accurately restate opinion of others even when he/she disagrees; ability to convey thoughts, concepts and ideas in a way that is clear and understandable; knows what to communicate, to whom and when, and does so in an appropriate manner.

Teamwork and Interpersonal Skills - Ability to work with others to achieve a common goal; cooperative; encourages collaboration; relates well to others; builds positive relationships; uses diplomacy and tact; builds rapport with others easily.

Clinic Staff:

***Added in 2017 for all Clinic Staff and Clinic Financial Services Staff under the "Service to Others" for Core Values score and to the Behaviors score:**

With the OSU Medicine Service Excellence Philosophy:

"We enrich lives by providing compassionate care and amazing service to every life we touch."

***Service to Others** – Anticipates the needs of others; provides prompt and courteous service with a positive attitude; takes pride in what he/she does.

***Behaviors**: We achieve our service standards with behaviors centered around safety, courtesy, presentation, and efficiency:

Safety is:

Be aware of environment
 Be intentional in your actions
 Ensure accuracy
 Mitigate potential hazards

Courtesy is:

Welcome/actively engage in a friendly/respectful way
 Be responsive, polite, and helpful
 Smile
 Show appreciation and say "Thank You"

Presentation is:

Be professional
 Have a clean and neat appearance
 Maintain a clean and organized work area
 Remember what you represent at all times

Efficiency is:

Respond to needs in a timely manner
 Organize and prioritize your work
 Be available and respect others' time
 Be innovative

Supervisory Skills (only if applicable):

The employee and the supervisor must each provide a summary about the employee's performance as it related to the Supervisory Skills defined below. The supervisor will input one rating for all of the skills. Support the rating with specific examples observed over the past year.

Empowering - Clearly & comfortably gives assignments to staff; communicates timeframes/resources/needed outcomes then gets out of the way and lets people perform.

Supervisory Courage - Able to deal with touchy situations directly and appropriately; not afraid to take negative action when necessary; handles issues at the risk of not being liked.

Developing Direct Reports - Recognizes learning needs of staff and offers them opportunities to develop.

Building Effective Teams - Creates synergy on team; manages in a way that creates strong morale and energy; balances needs of group with individual needs.

Problem Solving - Solves difficult problems with effective solutions; looks beyond the obvious and analyzes the true cause of issues.

Overall Rating:

5 = Consistently Exceeds Job Requirements - *Consistently* achieves highest level of performance in this particular aspect of job.

4 = Frequently Exceeds Job Requirements - *Often* achieves highest level of performance in this aspect of job.

3 = Fully Meets Job Requirements - Consistently performs at an *expected and satisfactory level*.

2 = Needs Improvement - Meets *some* requirements of this aspect of job, but is inconsistent and needs improvement.

1 = Unsatisfactory - *Does not meet* expectations in this aspect of job. Must improve or face serious corrective action.

This rating will include their overall performance as it relates to the core values, responsibilities, and behaviors described above for the last year. This rating is calculated automatically for you on the form. It will be an average of the 3-4 ratings entered on the form.

Goals Set For This Period:

List the employee's goals from the past 12 month period. Using the rating scale provided for this section on the form, evaluate the employee on completion of his/her goals. The employee will provide his/her own assessment as well.

Goals For Next Review Period:

The employee and supervisor should jointly set 3-5 SMART job goals for the employee to accomplish during the upcoming 12 month period. These goals should be reviewed at least quarterly in a meeting with the supervisor and employee. Remember SMART goals should meet the following:

S – Specific, M – Measurable, A – Attainable, R – Relevant, T – Time-based

Employee Development:

The employee and supervisor should discuss training and education that will benefit the employee.

Employee Comments:

The employee may add any additional comments about his/her overall performance.

Supervisor Comments:

The supervisor may add any additional comments about the employee's overall performance.

Signatures:

The employee, supervisor, and next level approval signatures will be recorded electronically within the Talent/Performance Management System.