ORU | ORAL ROBERTS UNIVERSITY

ANNUAL PERFORMANCE REVIEW

Process Overview and Review Form

Annual Performance Review

Overview

The cornerstone of a successful working relationship between a supervisor/manager and employee is consistent communication and feedback. The Annual Performance Review (APR) helps to recognize areas of strength and development. In addition to the APR, supervisors are encouraged to make employee feedback a continuous activity and utilize other communication methods that support departmental needs and professional development. The APR is designed to facilitate constructive discussion between the employee and supervisor in order to clarify performance objectives, provide feedback about the employee's performance with respect to skills and behaviors, and provide a framework for identifying employee development plans.

Supervisors should ensure that goals follow the S.M.A.R.T performance goals model outlined on the next page. Goals should be achievable within one year. If a goal is multi-year, it should be broken down into milestones of a year or less. Please carefully review the employee's performance during the prior year and provide supporting comments. The performance review should indicate the quality of performance and areas that may require further training and professional development. The ultimate goal is to create consistent communication that serves as a tool to empower employees and enhance performance.

Process

For all staff employees, performance and development evaluations are completed annually, with the APR corresponding with the month in which the employee was hired or rehired. If a new employee's initial 90-day review has been conducted within the past six (6) months, there is no need to conduct the APR for that year.

Schedule a time with your employee to discuss the APR content and establish goals for the next year. Once completed, keep a copy of the APR, and submit the original to Human Resources.

If you have questions, or need assistance with completing this form, please contact Human Resources at (918) 495-7163, or hr@oru.edu.

DEVELOPING WHOLE LEADERS FOR THE WHOLE WORLD

SMART Goals:
A Brief Overview for Managers and Employees

What are SMART Goals?

SMART goals are Specific, Measurable, Attainable, Relevant, and Time-bound. **SMART** goals allow your employees to develop a deep and precise understanding of the goal, its purpose, the way success will be measured, and the goal's connection to broader organizational priorities. It also creates a roadmap for scoping the work and drafting a plan of action. Designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful professional development.

SMART GOALS

S	Specific	What will be accomplished? What actions will you take? This includes the "who, what, when, where, and how" the goal(s) will be achieved.
M	Measureable	What data will measure the goal? (How much? How well? A numeric or descriptive measure that defines quantity, quality, cost, etc.)
A	Attainable	A goal that is within the employees' control and influence.
R	Relevant	A goal that is important to the mission of the department and organizational goals.
T	Time-Bound	A target date for completion or frequency of specific action steps that are important for achieving the goal.

Examples of SMART goals:

1. "Review and reduce the number of meetings on my calendar by 50% in order to enable more time for strategic planning by end of the month."

2. "Spend 2 days per month building my understanding by shadowing teammates in student interaction; deliver a write-up at the end on key learnings to the rest of the team."

3. "Ensure that the 90% of department training has been completed by the end of the quarter."

Annual Performance Review

Employee: _____   Department: _____

Job Title: _____   Annual Review Period From: _____ To: _____

Supervisor: _____   Supervisor Title: _____

SECTION 1. GOALS & OBJECTIVES

Completed by the Supervisor/Manager at Annual Review. Select the box next to the rating that represents the degree to which the employee's performance effectively and efficiently accomplishes tasks and assignments to meet the goals and objectives of the Department and University.

BELOW EXPECTATIONS	☐	NEEDS IMPROVEMENT	☐	MEETS EXPECTATIONS	☐	EXCEEDS EXPECTATIONS	☐
Clear need for improvement. Rarely performs at an acceptable level. Requires a performance improvement Plan.		Does not perform at an acceptable level consistently. Performance improvement plan highly recommended.		Meets and may occasionally exceed expectations. Performance is efficient, qualified, and skilled.		Consistently exceeds expectations in most key areas with initiative and significant achievement.	

TOP 3-5 GOALS for the next review period. Goals should be Specific, Measurable, Attainable, Relevant and Timely (**S.M.A.R.T.**)
1.
2.
3.
4.
5.

SECTION 2. CORE COMPETENCIES

Completed by the Supervisor/Manager. The combination of an employee's knowledge and technical capacities that allow the employee to provide a significant benefit to internal and external service receivers.

DEVELOPMENT	EFFICIENT	STRENGTH
Clear need for improvement. Requires a performance improvement plan.	Meets and may occasionally exceed expectations. Performance is efficient, qualified and skilled.	Consistently exceeds expectations in most key areas with initiative, and significant achievement.

CORE COMPETENCIES				
Teamwork	Demonstrates the ability to work together toward completion of a common goal and achieving it in the highest standard.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Quality of Service	Demonstrates a degree of excellence in the performance of one's duties.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Problem Solving	Demonstrates the ability to complete one's work when obstacles are encountered which may prevent the completion of assigned tasks.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Accountability & Job Knowledge	Demonstrates responsibility for one's actions and has a clear understanding of one's work and its impact on others.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Communication	Demonstrates the ability to exchange or convey ideas effectively, whether through speech or the written word, in carrying out one's responsibilities.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Leadership	Demonstrates the ability to guide and direct others in successfully completing their work in achieving a common goal. Answer if applicable.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Professional Conduct	Demonstrates the ability to model exemplary behavior in word, deed, and action.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐
Productivity	Demonstrates the ability to recognize and take responsible action by utilizing available resources essential to completing one's work.	DEVELOPMENT ☐	EFFICIENT ☐	STRENGTH ☐

SECTION 3. COMMENTS

COMMENTS: List key success factors moving forward. Provide specifics required to meet performance expectations as well as a timeframe to address areas of improvement, if applicable. Attach additional sheet(s) if needed.

Supervisor/Manager Comments

Employee Comments

SECTION 4. OVERALL ANNUAL PERFORMANCE RATING

Completed by the Supervisor/Manager. The overall Annual Performance Rating represents the degree to which the employee's performance effectively and efficiently accomplishes tasks and assignments to meet the goals and objectives of the Department and University. The overall rating should align with the Performance Rating in Section I, and take into consideration the Core Competencies and Comments in Sections 2 and 3.

ANNUAL PERFORMANCE RATING:

☐ Below Expectations

☐ Needs Improvement

☐ Meets Expectations

☐ Exceeds Expectations

SECTION 5. REVIEW ACKNOWLEDGEMENT

I acknowledge that I have had the opportunity to discuss this performance evaluation with my manager/supervisor and I have received a copy of this evaluation.

_____

EMPLOYEE SIGNATURE

_____

DATE

_____

SUPERVISOR/MANAGER SIGNATURE

_____

DATE

Questions concerning the review process?

We want the review process to be as smooth and beneficial as possible. If you have questions concerning conducting or submitting the annual performance review, or would like additional resources that can aid in the review process, please don't hesitate to contact a member of the Human Resources team for further direction.

hr@oru.edu

(918) 495-7163