

Policy 5.25 Performance Management Personalized Performance Plan

I. Planning - At the beginning of an annual review period:

- a. Supervisor and employee have a Performance Planning conversation to agree on a Personalized Performance Plan.
- b. Write at least three SMART performance objectives and for each objective, identify and select the university goal associated with it.
 - Supervisors must have one performance objective directly related to the successful completion of performance and feedback responsibilities with the staff they supervise.
- c. Discuss each Value and define behaviors as they relate to the Objectives and Professional Development Goals.
- d. Set two Professional Development Goals; one that leverages the employee's strengths and one that addresses an area for improvement.
 - Include an Action Plan for each goal.

II. Check-in meetings – At least twice during annual performance period:

- a. Meet and provide feedback and coaching related to Values and progress on Performance Objectives.
 - Modify Performance Objectives, if necessary.
 - Review progress on Professional Development Goals and adjust if necessary.
- b. Document these conversations.

III. Reviewing - At the end of the annual review period:

- a. Document and rate Actual Results for each Performance Objective.
- b. Rate each Value and document examples in the Comments sections.
- c. Review the employee's Professional Development Goals and document Progress.
- d. Rate Overall Performance based on the Performance Objectives and Values.
- e. Provide a Summary and allow for Comments by the supervisor and employee.
- f. When your discussion is complete, both supervisor and employee must sign in box below.
- g. Forward the signed Personalized Performance Plan to Unit Human Resources.
 - Retain a copy in the department file and provide one to the employee.
- h. Start the next review period with a new Personalized Performance Plan. See above, I. Planning.





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Personal Information

Employee Name:

Employee ID#:

Job Title(s):

Supervisor Name:

Department Name(s):

Period covered by this review:

Performance Planning

Performance Planning Meeting Completed:

Supervisor's signature:

Employee's signature:

Check-in Meetings

Check-in Meeting #1 Completed:

Check-in Meeting #2 Completed:

Performance Review

Annual Performance Review Completed:

Supervisor's signature:

Employee's signature:



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Performance Objectives: WHAT

The instruction guide for completing this form can be found at hr.osu.edu/hrpubs/#performance_management

Definitions

Strategic Goals: One University, Students First, Faculty and Staff Talent and Culture, Research Prominence, Outreach and Collaboration, Operation and Financial Soundness and Simplicity

Ratings: Exceeds, Meets, Does Not Meet

Performance Objective 1

Objective:

Related Strategic Goal:

Results:

Rating:

Performance Objective 2

Objective:

Related Strategic Goal:

Results:

Rating:



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Performance Objective 3

Objective:

Related Strategic Goal:

Results:

Rating:

Performance Objective 4

Objective:

Related Strategic Goal:

Results:

Rating:



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The Ohio State University Values

The instruction guide for completing this form can be found at hr.osu.edu/hrpubs/#performance_management. See the Aligning Behaviors document at osu.edu/eminence/assets/files/aligning_behaviors.pdf for more information.

Definitions

Ratings: Guiding, Demonstrating, Not Demonstrating

Excellence

Excellence in the standards we set, the results we produce, the relationships we are in, and the dedicated service we provide.

Excellence is defined for you as:

Rating:

Collaborating as One University

Our aspirations demand we remove internal boundaries – we must share information, promote teamwork, and think creatively to make this happen.

Collaborating as One University is defined for you as:

Rating:

Integrity and Personal Accountability

We accept responsibility for our actions, we keep our word, we focus on solutions rather than fault and blame, and we take initiative to make things happen.

Acting with Integrity & Personal Accountability is defined for you as:

Rating:

Openness and Trust

Our communication is direct and honest, we promote authenticity and transparency in our relationships and activities, we're open to feedback and coaching, and we give feedback with candor and respect.

Openness and Trust is defined for you as:

Rating:



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Diversity in People and Ideas

The health of our environment demands that we respect each other, that we are inclusive, and that we profoundly value who each of us is as a whole person and what each of us uniquely contributes.

Diversity in People and Ideas is defined for you as:

Rating:

Change and Innovation

These principles are our heritage and our future – we're curious, we're creative, and we embrace positive, constructive conflict.

Change and Innovation is defined for you as:

Rating:

Simplicity in Our Work

In the administration and management of our enterprise we are responsive, ethical, and transparent and we strive to make the functioning of this complex institution simple and efficient.

Simplicity in Our Work is defined for you as:

Rating:

Comments

Overall Comments:



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Professional Development

The instruction guide for completing this form can be found at hr.osu.edu/hrpubs/#performance_management.

Definitions

Our Values: Excellence, Openness and Trust, Simplicity in Our Work, Collaborating as One University, Diversity in People and Ideas, Change and Innovation, Acting with Integrity and Personal Accountability

Value to Leverage:

Professional Development Goal:

Action Plan:

Progress:

Value to Develop:

Professional Development Goal:

Action Plan:



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Value to Develop, continued:

Progress:

Additional Professional Development Goal

Professional Development Goal:

Action Plan:

Progress:



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Overall Rating

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Overall Rating:

Based on the Performance Objectives and Values, select an Overall Rating: (Exceeds, Meets, Does Not Meet¹)

Rating:

¹ When selecting Does Not Meet, a supervisor must initiate a performance improvement process in consultation with your Senior HRP or unit HRP and OHRC. Review the Ohio State job aid on Performance Improvement Plans for more information.

Training and Compliance

Course Name:

Date Completed:

Course Name:

Date Completed:

Course Name:

Date Completed:

Summary Comments

Supervisor's Comments:

Employee's Comments:

Prior Years Ratings

2008: (Exceeds, Meets, Does Not Meet)

2007: (Exceeds, Meets, Does Not Meet)