

## Process and Prompts for Annual Administrative Performance Review for Associate Deans, Assistant Deans, Department Chairs, and Directors

### Purposes

- To provide a consistent, valid, and effective performance review
- To improve individual performance through reflection and feedback
- To align individual goals and performance with unit plan, goals, and performance
- To identify individual development needs and opportunities
- To communicate administrative effectiveness and value to internal and external constituents

### Annual Performance Review Process:

1. On an annual basis, or when a ranked, excluded faculty member moves into the administrative position, the supervisor will schedule a meeting to:
  - Discuss the unit plan and priorities for the upcoming year as appropriate to the reviewee's position description. The conversation will serve to set mutually agreed upon expectations and goals for the upcoming year.
  - Discuss, identify, and agree on Evaluation Criteria (listed below) for the next performance review.
2. The **first Monday of March**, the supervisor will initiate the evaluation process sending the reviewee the Self-Evaluation form with the agreed upon evaluation criteria.
3. The reviewee will complete the self-evaluation form, addressing the identified criteria. Self-evaluation forms are found at <http://www.pdx.edu/oaa/annual-performance-review-academic-administrators>
4. The supervisor will schedule a one-on-one meeting to:
  - Discuss the reviewee's written self-evaluation.
  - Discuss the supervisor's evaluation with specific and constructive feedback on strengths and areas needing improvement, including specific skill development.
  - Brainstorm ways to enhance the employee's performance and goal attainment through support and feedback from the supervisor.
  - Discuss priorities for the upcoming year, as appropriate to the reviewee's position description. The conversation will serve to set mutually agreed upon expectations and goals for the upcoming year.
  - Identify potential areas for professional development that align with expectations and goals
  - Discuss and agree on evaluation criteria for the upcoming year.
  - Discuss possible revisions to job description, if any.
5. Following the one-on-one meeting with the reviewee, the supervisor will send a summary of the meeting to the reviewee, with a copy retained in the reviewer's office and a copy sent to HR, by the **fourth Friday in April**. Reviewer Summary forms are found at <http://www.pdx.edu/oaa/annual-performance-review-academic-administrators>

### **Evaluation Criteria Categories:**

These evaluation criteria comprise possible areas of responsibility of a ranked excluded employee serving in an administrative position. The supervisor conducting the review and the employee will review the current position description, the unit plan, and mutually agreed upon expectations and goals to determine which criteria should apply for the upcoming review year. For each of the following that apply, the individual being reviewed should provide their most significant accomplishments and challenges in terms of meeting mutually agreed upon expectations and goals.

#### **Core Criteria:**

**1. Fiscal Resource Management**

Activities related to revenue enhancement, fund-raising, budget management, cost cutting, and resource allocation.

**2. Human Resource Management**

Activities related to recruitment, hiring, work assignment, performance management and improvement, employee development, conflict management,

**3. Leadership**

Activities related to role modeling, mentoring, motivating, leading change and innovation, envisioning, developing competency in others, fostering collaboration and teamwork

**4. Diversity and Inclusiveness**

Activities related to hiring, educating and training, creating a conducive climate, and monitoring/addressing issues necessary for the development and maintenance of a diverse and inclusive community

#### **Additional Job-specific Criteria:**

If applicable, the review should also include categories of job-relevant activities that do not fit into, or go beyond, the above 4 core criteria categories. Possible categories could include aspects such as Curriculum/Program Development, External/Community Outreach, Student Experience/Retention, etc.