

City of Portland
Office of Management and Finance, Business Operations Division
Staff Development and Performance Evaluation Form

Employee Name:

PERNR:

Bureau/Division:

Classification:

Review Period:

Anniversary Date:

Supervisor Name:

Action/Merit Increase Awarded:

list action or merit increase (4.1% maximum) recommended.

Signatures

Supervisor Signature

Date

Employee Signature

Date

Reviewer Supervisor Initials:

Employee Name:
PERNR:

City of Portland
Office of Management and Finance, Business Operations Division
Staff Development and Performance Evaluation Form
Employee Self-Evaluation Form - *Annotated*

Self-Evaluation

The self-evaluation should be completed and submitted to your supervisor three to four weeks prior to your anniversary to help ensure timely completion of your evaluation.

List the goals you and your supervisor agreed upon and describe key accomplishments or progress made under each goal. Keep your summary concise but complete. Your goals may be grouped under the OMF Strategic Plan Strategic Themes (below) and will include strategies from the OMF Work Plans.

1. Quality Customer Service/Trusted Business Partner
2. Operational Excellence
3. Financial Sustainability
4. Workforce Development/Employer of Choice

This is your opportunity to:

- Summarize key achievements, projects, or commendations, both related to previously set goals and outside of those goals.
- Identify and discuss changes to planned goals or projects.
- Identify barriers to completing goals and suggest solutions.

If applicable, review your updated Learning Plan separately developed with your supervisor.

- 1. List the job performance and professional development goals identified for this review period. Describe actions you took to achieve them or progress made toward achieving them. Identify where goals changed and how changes were addressed.**

- 2. Provide any other feedback.**

This is your opportunity to provide any other feedback or additional comments.

Employee Name:
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3. Provide a draft list of job performance and professional development goals for your next rating period. Please be specific about the outcomes you want to accomplish. If you and your supervisor have developed and agreed upon a Learning Plan with Twelve Month Development Objectives, attach your plan containing updated development objectives.

Suggest goals for the next rating period under the appropriate OMF Strategic Plan Strategic Theme. It is not required that you have a goal under every Theme. See the list of organizational goals and strategies in the annotated Goal Sheet to help align your goals with the organization's goals. You can draw from your previous goals and accomplishments, job assignments and any planned or desired changes to these, and changes in plans/barriers to completing goals.



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Staff Development and Performance Evaluation Form
Supervisory Evaluation- *Annotated*

Evaluation by Supervisor

1. Briefly describe the employee's responsibilities and assignments during the rating period.

Summarize the employee's responsibilities, when they were appointed to the classification or team, and their overall assignments during the evaluation period. Include ongoing and one-time assignments, lead responsibilities, project team assignments, and subject matter expertise responsibilities. Note any assignment changes that may have occurred during the period.

2. Summarize the work performed by the employee over the prior rating period, highlighting strengths, weaknesses, and opportunities to grow. Include a discussion of professional development objectives.

It is a good idea to review the classification specifications and the Business Operations Division employee expectations prior to preparing the review. This narrative section should cover:

- The employee's goals and achievements in support of those goals during prior rating period, including examples.
- The quality and quantity of the employee's work, and the employee's approach to work, including examples.
- Areas in which the employee currently exceeds or meets expectations for the position.
- Areas in which the employee needs to develop or improve, including the improved outcomes expected. Items discussed in this area would likely tie to a job performance or professional development goal on the Goal Sheet.
- Challenges the employee faced during the review period.

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Staff Development and Performance Evaluation Form
Goal Sheet for Next Rating Period - *Annotated*

Next Rating Period Dates: _____

Goals

List goals related to work assignments and job performance for the next rating period and describe the outcome you expect the employee to achieve. Goals should be listed under the appropriate OMF Strategic Plan Strategic Theme. It is not required to have a goal under each theme. Please review the employee's self-evaluation, in which they have suggested goals for themselves for the next rating period. Resources for developing goals include:

1. Ongoing and one-time assignments, lead responsibilities, project team assignments, and subject matter expertise responsibilities.
2. Opportunity areas for development or improvement identified in the evaluation.
3. Business Operations Division employee expectations and supervisory expectations.
4. Business Operations Division Services Description.
5. OMF Strategic Plan Strategic Themes (below) and their underlying goals.
 - Quality Customer Service/Trusted Business Partner
 - Operational Excellence
 - Financial Sustainability
 - Workforce Development/Employer of Choice
6. OMF Values as articulated in the Strategic Plan:
 - Accountability
 - Collaboration
 - Equity
 - Innovation
 - Service
 - Sustainability
7. OMF Work Plans
8. OMF Customer Service Framework
9. Citywide Equity Goals

Goals related to the employee's development could be listed under the Workforce Development/Employer of Choice Strategic Theme, or under another applicable theme. Employee development goals can be approached from any of these perspectives:

1. Things the employee knows and can teach or improve.
2. Things the employee will learn and apply to his/her job.
3. Things the employee will learn and share with colleagues.

Sample goals include:

Quality Customer Service/Trusted Business Partner:

Develop a shared tracking system for customer requests to document requests, status, follow up actions, and completion. Ensure that team members use the tracking system to demonstrate consistent, accurate, and timely response to customer requests.

Operational Excellence:

Complete a technology course in Visio; create/modify organizational charts and create/modify process flows in order to improve and document key business processes for the team.

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Financial Sustainability:

Monitor spending for assigned divisions, preparing regular reports that are timely, accurate, clear and understandable to division management both in and after the meeting where they were presented, and include thoughtful recommendations. Participate in the monthly Accounting Advisory Committee meetings as the Business Operations Division representative and share meeting notes. Increase the Division's compliance with Citywide accounting practices; represent the Division by coordinating input and feedback needed by the Committee; communicate business process changes; and recommend best practices within Business Operations.

Workforce Development/Employer of Choice:

Develop a summer training series focusing on financial processes and concepts used by Business Operations staff. Develop curriculum, schedule courses, recruit instructors and manage documentation. Coursework should lead to shared and consistent knowledge around key systems and processes and exposure to best practices.

List the employee's job performance goals for the coming rating period, including a timeframe, expected outcome, and relationship to organizational goals.