

# **Lundquist College of Business OA Performance Evaluation Performance Competency Rating Matrix**



The overall employment experience and effectiveness of the College, and the University, reaches its fullest potential when we work collaboratively within our units and more broadly within the University through relationships built on trust. At the Lundquist College of Business, we create a welcoming experience for the entire University of Oregon community and its constituents by providing excellent service to students, parents, and community members, as well as internal and external colleagues.

## What is this document?

This document describes the behaviors associated with the areas of core commitments (professional competencies) identified for the OA staff of the Lundquist College of Business. This document and the matrix below, creates a shared vision, a strong identity and culture. It also supports people management practices, such as recruitment and selection, learning and development, managing performance, and career development.

The core commitments establish expectations of employees which foster a caring community in support of the college mission. These core commitments cut across the roles within the college and provide some focus as to potential areas of development that may be relevant for individual members of staff. The behaviors provide a framework for determining a performance category and organizing specific feedback. They do not constitute a comprehensive list. This document should be used as a supplemental resource.

## Why should we use this?

Employees: Accurately determining performance for each core commitment assists in identifying your strengths and areas for development.

As you go through this document, you may feel that bullet points in more than one column are applicable when trying to select on how you would rate yourself. That is to be expected as we all learn and grow differently. Look at this as a tool for you to use as you prepare to meet with your supervisor and discuss both your strengths and areas where you would like opportunities for professional growth. Please select the rating under which the majority of statements are applicable then use the comment boxes following the rating section on the self-evaluation form to articulate those areas where you are most proud and those where you are most interested in professional development opportunities.

Managers: Differentiating performance is challenging. A shared understanding of performance allows for clear and direct feedback to every member of the team.

## Key descriptors of areas in relation to core commitments:

We have moved away from using the old rating scale when it comes to core commitments (professional competencies) and have moved to one that is meant to reflect both strengths and development opportunities. For each commitment, there are four ratings, with overarching definitions as follows:

- **Area of concern:** This rating reflects a need for improvement. This correction in performance may be due to lack of essential knowledge, lack of intentionality, lack of engagement, failure to grasp concepts, failure to adapt to change, inconsistent performance, the need of constant oversight in the completion of task, or a lack of confidence in work or output.

- **Area of Needed Development:** This rating suggests there is potential for growth in the role which may be obtained through professional development, additional time spent in the role to learn and/or apply knowledge, the employee's desire to learn and apply knowledge with some oversight needed as they continue to develop, and the pursuit of information to learn best practices. An employee at this level is gaining and earning confidence in their work.
- **Area of Competence:** This rating reflects engagement in the work, with the team, and with the unit as a whole. The quality of work aligns with the level of experience and the employee requires little to no supervision in current responsibilities and actively seeks opportunities to learn more and work with others and contributes to team performance. The employee adapts to change and/or new responsibilities, looks for the positive in change, and they accept and provide constructive feedback.
- **Area of Mastery:** This rating reflects a mastery of responsibilities related to the commitment. The employee may seek to grow beyond position and apply their expertise beyond departmental objectives. They display a prominent level of confidence in responsibilities and how their position impacts College objectives. They are sought out as an expert and are a leader in collaborative projects.

When thinking about each core commitment, there is a general definition provided, along with key attributes, and a table that provides bullets on when an area needs improvement or when the area is one of mastery. There will be overlap, but the general path is one of continuous improvement.

## Feedback?

We want your feedback. This tool was developed to help prepare for meetings between supervisors, to encourage open conversations, and to help each of our employees thrive. Please take a moment to provide your thoughts on this revised process so we can continue to improve. A space is available at the end of the self-assessment form.

**JOB KNOWLEDGE & SKILLS:** Demonstrates an understanding of concepts, methods, techniques, and principles necessary to accomplish job duties. Keeps current on technical matters and professional development in his/her area; Responds accurately to inquiries. Consults with others and uses resources appropriately. Demonstrates knowledge of inclusive practices and respectful workplace expectations.

**KEY ATTRIBUTES:**      **Job Skills**      **Professional Knowledge**      **Work Performance**

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Does not demonstrate the ability to complete job functions as expected.</li> <li>• Does not perform job functions in line with supervisor’s expectations.</li> <li>• Inability to complete tasks or impedes the flow of work processes.</li> <li>• Relies on others to complete own work.</li> <li>• Unable to incorporate past experiences to current job situations.</li> <li>• Does not apply current knowledge or job experience to effectively problem solve. Performance does not demonstrate technical competence.</li> <li>• Resistant to continuous learning; does not take initiative in attending training or developing working knowledge or skill set to enhance job skills.</li> <li>• Reluctant or unwilling to share knowledge with others; is outwardly unsupportive of team members increasing skills.</li> </ul>	<ul style="list-style-type: none"> <li>• Shows potential in skills and desire continued growth.</li> <li>• Due to time within position may have continued areas to develop to gain proficiencies.</li> <li>• Displays desire to learn but still needed knowledge of position and/or how position works within team.</li> <li>• Acts in ways that demonstrates an understanding for job functions while learning more intricate details of responsibilities.</li> <li>• Takes initiative to learn and apply knowledge but needed development in specific areas still sought.</li> <li>• Has basic professional knowledge of position but needed growth in relation to University or Departmental expectations.</li> <li>• Demonstrates a willingness and eagerness to learn new things but needs guidance in application of learning to functions of position.</li> </ul>	<ul style="list-style-type: none"> <li>• Job functions are performed in line with the supervisor’s expectations.</li> <li>• Tasks are completed and contributes to work processes flowing smoothly.</li> <li>• Achieves an accomplished level of technical and professional skill or knowledge in position-related areas.</li> <li>• Incorporates past job experience and technical knowledge in current job.</li> <li>• Applies own talents to work assignments, and hones the competencies needed in current job</li> <li>• Takes charge of self-development by soliciting feedback, setting priorities, and then acquiring or strengthening skills and knowledge.</li> <li>• Puts new skills and knowledge to use in a timely and effective manner.</li> <li>• Seeks out and attends learning and development programs when possible.</li> <li>• Solicits assignments in preparation for future responsibilities.</li> <li>• Stays informed of current developments and trends in areas of expertise.</li> <li>• Maintains awareness of and applies relevant policies and long-term objectives.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrates proficiency in supervisor’s expectations and shares this knowledge to positively impact the work environment.</li> <li>• Ensures task completion and participates in additional projects/tasks as appropriate.</li> <li>• Is often looked to provide mentoring internal and external to department.</li> <li>• Effectively applies vast technical knowledge and prior experiences to job situations; is sought out as an expert to provide advice or solutions.</li> <li>• Highly knowledgeable in field; applies skills and knowledge to enhance the department and college.</li> <li>• Regularly engages self and others in professional development, enhancing job performance and overall productivity.</li> <li>• Consistently shares knowledge with others, seeking opportunities for self and peers to enhance outcomes.</li> <li>• Anticipates consequences and trends accurately; is a go-to person.</li> <li>• Continuously experiments with and creates new processes as an innovative leader.</li> </ul>

**JUDGEMENT, PROBLEM SOLVING, AND DECISION MAKING:** Identifies priorities and acts on them. Takes initiative in identifying and researching problems. Develops appropriate and creative solutions and selects the best course of action. Act in a timely manner after considering critical factors. Adheres to professional ethics and best practices. Problem solving reflects innovation and creativity. Demonstrates sound judgment.

**KEY ATTRIBUTES:**      **Adapt to Change**                      **Creativity & Innovation**                      **Problem-Solve**                      **Quality Focus**

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Unable to distinguish between critical and noncritical issues.</li> <li>• Unable to analyze and prioritize problems resulting in a tendency to focus on simple operational issues and avoiding complex tasks essential for job success.</li> <li>• Fails to identify the need for a different approach or solution when one is required.</li> <li>• Inability to view a problem from multiple perspectives.</li> <li>• Draws conclusions without conducting a thorough analysis.</li> <li>• Frequently produces work that falls below expectations of quality, contains errors and requires rework.</li> <li>• Avoids learning techniques to improve or implement changes to one’s work.</li> </ul>	<ul style="list-style-type: none"> <li>• Continues to see progress towards problem solving techniques as duties are more learned/developed.</li> <li>• Understands change but needed focus on change management processes and problem-solving.</li> <li>• Ability to adapt but continual focus on quality of work desired.</li> <li>• Looks for opportunities but still needed focus on details of current duties.</li> <li>• Take the initiative to look at current processes and change but may not pause to gather all relevant information.</li> <li>• Struggles in accepting innovative ideas and opinions; reluctant to adapt one’s behavior.</li> </ul>	<ul style="list-style-type: none"> <li>• Adjusts quickly and effectively to changing conditions and demands.</li> <li>• Discusses change as a necessary and inevitable aspect of organizational life and as an opportunity to learn new things.</li> <li>• Identifies the need for a different approach or solution.</li> <li>• Stays up to date on long-term University objectives and information that affects individual job and dept.</li> <li>• Sees opportunities for creative problem solving while staying within the parameters of best practice.</li> <li>• Thinks in terms of desired outcomes; generates practical solutions to difficult problems.</li> <li>• Has established a record of accomplishment of producing work that is highly accurate and demonstrates attention to detail.</li> <li>• Accurately checks processes and tasks for complete information and opportunities for improvement.</li> <li>• Ensures quality by comparing finished product to expected outcome.</li> </ul>	<ul style="list-style-type: none"> <li>• Quickly masters innovative ideas and leads others through challenges or change.</li> <li>• Understands the value of continuous improvement and seeks information and takes the lead to facilitate the growth.</li> <li>• Ability to project the outcomes of a project and predict the best possible solution for the team.</li> <li>• Proactively uses analysis to change common practices and provide solutions to complex problems.</li> <li>• Anticipates and acts to avoid complications.</li> <li>• Thinks in innovative and creative ways to achieve strategic objectives for Department in alignment with University objectives and goals.</li> <li>• Leads in development of best practices to continually improve quality efforts.</li> </ul>

**COMMUNICATION, RELATIONSHIP BUILDING, & COLLABORATION:** Listens actively. Accepts and offers feedback constructively. Develops clear, concise, and complete written materials. Shares information as needed and in ways that promote collaboration. Understands and is responsive to differences in communication styles based on cultural or other factors. Demonstrates treatment of others with dignity and respect. Has the ability to communicate effectively with co-workers, students, and faculty, staff, and community members from a wide range of cultural backgrounds.

**KEY ATTRIBUTES:** Relationship Management      Respect Diversity      Teamwork & Collaboration

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Withholds information or expertise intentionally or unintentionally that corrodes the trust and cohesiveness of the team.</li> <li>• Does not meet communication expectations set forth and necessary to complete job duties. Not interested in supporting or often contradicts the presence of differing viewpoints or work styles in the workplace resulting in disunity of the team.</li> <li>• Inability to recognize the value of differences.</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration efforts improving with additional knowledge of duties and/or need for shared information.</li> <li>• Is gaining understanding of shared work and need for contributions of others and for others.</li> <li>• Continued learning in how to support others and pull together resources for project completion.</li> <li>• Tendency to participate in self-promotion vs to strengthen the team.</li> <li>• Struggles to build strong, mutually beneficial working relationships with constituents and coworkers.</li> <li>• Struggles to involve and support all team members; struggles to share credit for innovative ideas and successes.</li> </ul>	<ul style="list-style-type: none"> <li>• Builds relationships within, across and outside the organization while working collaboratively with internal and external partners to reach the goals of the department.</li> <li>• Works through difficult or awkward interpersonal situations in a positive manner.</li> <li>• Gives and receives appropriate feedback to help accomplish goals and establish confidence among partners.</li> <li>• Demonstrates a genuine interest in the thoughts, opinions, values, and needs of co-workers, and constituents.</li> <li>• Recognizes and supports employees' and partners' contributions.</li> <li>• Is an effective team player who adds complementary skills, contributes valuable ideas, opinions, and feedback.</li> <li>• Can be counted upon to fulfill commitments made to the team</li> </ul>	<ul style="list-style-type: none"> <li>• Champions inclusiveness: involves others to improve results and increase support all within a timely manner.</li> <li>• Resolves conflicts in ways that strengthen relationships and the organization; creates "win-win" results.</li> <li>• Identifies opportunities and encourages colleagues to share relevant and appropriate information with others.</li> <li>• Encourages, recognizes, and incorporates diverse points of view.</li> </ul>

**PLANNING AND PRODUCTIVITY:** Completes assignments and projects within a specified period. Consistently meets deadlines. Organizes and prioritizes appropriately. Delegates work when appropriate. Consult with supervisor regarding workload, as necessary.

**KEY ATTRIBUTES:**                      **Discernment**                                      **Deliver Results**                                      **Plan & Organize**

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Does not understand physical, financial, reputational risks within department and the University in performance of duties.</li> <li>• Consistently needs additional information to accomplish tasks delaying results.</li> <li>• Consistently “jumps to conclusions” based on no, or minimal, evidence; does not take time to collect facts before decision- making.</li> <li>• Results are frequently delayed, and timelines require constant adjustment.</li> <li>• Does not meet productivity standards, deadlines, and work schedules.</li> <li>• Inability to manage own time.</li> </ul>	<ul style="list-style-type: none"> <li>• Due to complexity of position, additional development needed to understand impacts of decisions and/or delays.</li> <li>• Growth potential in area of planning and organizing with additional exposure to work processes.</li> <li>• Is continuing to learn organization of work to become more efficient.</li> <li>• Is learning to utilize resources available and seeking additional resources as needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Identifies, analyzes, and controls the risks (physical, financial, reputational) in department and the University.</li> <li>• Takes prompt action to accomplish objectives, even when information is limited or unclear.</li> <li>• Achieves results within established timelines.</li> <li>• Comes to work on time, and meets productivity standards, deadlines, and work schedules, effectively manages own time.</li> <li>• Overcomes obstacles to achieve results.</li> <li>• Organizes resources and processes to effectively accomplish the work of the department.</li> <li>• Anticipates potential challenges and opportunities, adjusting plans as appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>• Implements clear decision-making strategies and provides effective communication to all affected individuals and departments in a timely manner.</li> <li>• Achieves results ahead of established timelines and takes initiative to contribute beyond scope of required job duties or expectations.</li> <li>• Searches for and implements continuous quality improvement to processes and policies.</li> <li>• Anticipates challenges and opportunities and provides a clear plan for adjustment without delay.</li> <li>• Seeks opportunities to teach, mentor, and find resources to add value to team, department, and/or university.</li> </ul>

**FINANCIAL AND RESOURCE MANAGEMENT:** Works within budgets to meet operating objectives. Utilizes university resources effectively to minimize and control expenses. Thinks strategically regarding fiscal management.

**KEY ATTRIBUTES:**

**Financial Stewardship**

**Strategic Thinking**

**Planning & Prioritization**

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Lack of intentionality, failure to research options</li> <li>• Lack of understanding related to the needs and budget constraints of the unit</li> <li>• Fails to adjust to changing policies and procedures</li> <li>• Failure to consistently utilize University pricing agreements and purchasing portals</li> <li>• Inconsistent documentation</li> <li>• Procurement activities need constant oversight</li> </ul>	<ul style="list-style-type: none"> <li>• Developmental opportunities with budget administration</li> <li>• Additional training needed to learn and/or apply knowledge of policies and purchasing software</li> <li>• Has desire to learn and apply knowledge</li> <li>• Learning but some oversight needed</li> <li>• Seeks information and is learning best practices</li> <li>• Understands the importance of articulating business purpose</li> </ul>	<ul style="list-style-type: none"> <li>• Considers budget and need</li> <li>• Engages with team, department, College, and University colleagues</li> <li>• Needs little to no supervision</li> <li>• Seeks opportunities to learn more and work with others to realize efficiencies</li> <li>• Looks for ways to improve processes through effective planning and prioritization</li> </ul>	<ul style="list-style-type: none"> <li>• Is strategic in the management of department, College, and University assets</li> <li>• Can predict needs to ensure adequate resources are deployed to meet unit needs</li> <li>• Elevated level of understanding of University and College policies and procedures which they share with others</li> <li>• Acts as a steward of University and College resources always</li> </ul>



**RELATIONSHIPS WITH CUSTOMERS, COLLEAGUES, AND COWORKERS:** Provides excellent customer service and understands the importance of responding courteously and promptly to all internal and external customers. Exhibits the ability to adapt to differences in personalities, work styles, and cultures. Works in a positive, supportive, and respectful manner with students, staff, faculty, other departments, and the public. Demonstrates treatment of others with dignity and respect. Has the ability to work with co-workers, students, and faculty, staff, and community members from a wide range of cultural backgrounds.

**KEY ATTRIBUTES: Communicate Effectively      Constituent Service**

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Does not communicate to the appropriate individuals effectively.</li> <li>• Unable to adjust or correctly respond to behavioral cues of others.</li> <li>• Does not demonstrate active listening: interrupts others, loses attention, and/or misstates information.</li> <li>• Does not display tactfulness and is inconsiderate to other parties on a consistent basis; does not select the right approach or tone of voice for the situation or audience.</li> <li>• Frequently does not anticipate or respond timely to constituent needs.</li> </ul>	<ul style="list-style-type: none"> <li>• Is starting to demonstrate understanding of how work involves others or crosses functional areas.</li> <li>• Continued growth needed in learning how to effectively communicate needs of position.</li> <li>• With continued development will learn complexity of work in relation to other units/departments.</li> <li>• Confidence in performance of work is being developed with continued exposure.</li> </ul>	<ul style="list-style-type: none"> <li>• Communicates effectively and appropriately; uses good judgment as to what to communicate to whom.</li> <li>• Tactful toward and considerate of all parties.</li> <li>• Identifies and anticipates constituent needs and expectations and responds to them in a timely and effective manner.</li> <li>• Takes responsibility for constituent satisfaction and loyalty</li> <li>• Practices active listening:</li> <li>• Allows others to speak without unnecessarily interrupting them.</li> <li>• Displays professionalism by: Maintaining composure, convey competence, establish positive relationships, meets service and quality expectations of clients.</li> </ul>	<ul style="list-style-type: none"> <li>• Knows and understands complexity of work and involves the appropriate constituents at appropriate times and without delay.</li> <li>• Presents information in a format that is easily understood by a wide variety of constituents with great confidence.</li> <li>• Goes beyond service expectations to help implement complete solutions.</li> <li>• Consistently displays professionalism and effectively responds with patience, tact, and grace, even to others who are difficult or demanding</li> <li>• Actively seeks information and consistently works to understand others' perspectives.</li> </ul>

**ADHERENCE AND SUPPORT OF UNIVERSITY POLICIES AND PROCEDURES:** Understands and consistently adheres to university policies and procedures. Complies with university policies and applicable federal and state laws and regulations. Consistently practices and promotes a safe working environment in compliance with the employee safety guidelines. Maintains the highest ethical standards within their department and within the university.

**KEY ATTRIBUTES:** Integrity      Organizational/Departmental Commitment      Organizational Compliance & Safety

Area of Concern	Area of Needed Development	Area of Competence	Area of Mastery
<ul style="list-style-type: none"> <li>• Actions do not demonstrate understanding of department’s commitments and vision.</li> <li>• Frequently blames others for mistakes and rarely takes personal responsibility.</li> <li>• Actions impede the department’s progress and/or change in mission, purpose, or values. Does not demonstrate respect for University/Dept resources.</li> <li>• Does not follow University policy and/or complete required trainings on time.</li> </ul>	<ul style="list-style-type: none"> <li>• Continued growth in understanding departmental/ University overall goals in relation to work performed.</li> <li>• Need to gain more knowledge in University/ Departmental vision and goals and how it impacts work within position.</li> </ul>	<ul style="list-style-type: none"> <li>• Acts in ways that demonstrate personal integrity and serves as a positive example of why others should trust the motives of the organization.</li> <li>• Views self as a reflection of the organization by following through on commitments and accepting ownership of any mistakes he or she might make.</li> <li>• Conveys an elevated level of concern for the well-being of others, helping to ensure that both their needs and those of the organization are met.</li> <li>• Acts in accordance with University policies and completes required trainings by date due</li> <li>• Takes responsibility for campus property, intellectual property, and University-related data.</li> <li>• Adheres to the University’s code of conduct and ethics.</li> </ul>	<ul style="list-style-type: none"> <li>• Preserves and is sought out to educate others about the dept mission, core values and commitments.</li> <li>• Demonstrates constant review of University resources and speaks of stewardship in relation to work.</li> <li>• Reflects the University’s best intentions in all work interactions; considered an ambassador for the University/Dept.</li> <li>• Raises awareness of safety/compliance topics related to work of department.</li> <li>• Frequently finds ways to implement commitments within work of department/University and shares with others.</li> </ul>