

Management Performance Evaluation and Development Form

Mansfield University of Pennsylvania

Instructions in Brief For Managers and Supervisors

1. The manager and supervisor review the performance elements listed on page 2 and other targeted performance expectations that were established for and during the performance period under review. These performance expectations should have included particular behaviors, special assignments, specific goals or results, special training, etc., that would have ensured the expectations were valid for feedback purposes.
2. **Each manager shall write a brief narrative, not to exceed two pages, summarizing his/her results as they relate to the pre-established goals and accomplishments. This narrative shall be provided to the manager's supervisor before the supervisor prepares his/her draft evaluation.**
3. The supervisor drafts Parts I through IV of the form. These comments should be based on observed performance in relation to the manager's duties and responsibilities, performance expectations and relevant performance elements. Special attention should be paid to linking the manager's job and performance expectations to the organization's goals, values, objectives, and quality improvement efforts.
4. Only the manager completes Part V of the form. This is the manager's opportunity to give the supervisor feedback as to what other support he/she feels is needed to foster effectiveness.
5. The supervisor will meet with his/her supervisor (reviewing officer) to discuss the tentative evaluation of the manager before meeting with the manager. The manager and supervisor meet to review Parts I through IV of the form. The goal is to have an open and constructive discussion that leads to a clear understanding of the manager's past performance as well as future expectations and development objectives. The manager is expected to share his/her response to Part V of the form during the feedback session.
6. If the need arises, the reviewer (typically the second line supervisor) should function as a mediator upon the request of either the supervisor or the manager.
7. Following the feedback session, the supervisor prepares the final form, provides the performance rating and shares it with the manager. Ratings are: 1-Below Expectations; 2-Needs Improvement; 3-Meets Expectations; 4-Exceeds Expectations; 5-Significantly and Consistently Exceeds Expectations. Whole numbers **only** are to be assigned. Mid-range ratings are not acceptable. If the manager has not shared his/her response to Part V of the form with the supervisor, it should now be included on the form.
8. The supervisor signs the form, gives it to the manager to sign, then gives the form to the reviewer along with the manager's narrative, whose signature indicates that the process has been followed appropriately. It is not the reviewer's role to make changes to the evaluation, but it is expected that the reviewer would provide comments relative to the manager's performance. The supervisor ensures that the manager receives a copy, and the original is provided to the Office of Human Resources for inclusion in the manager's official personnel file.

Performance Elements

The following “performance elements” and goal attainment should be considered, where applicable, in assessing employee performance (Parts I and II) and determining future performance expectations and development needs (Parts III and IV). Other performance elements may be added as needed.

Communication/Interpersonal Skills

- Exhibits knowledge and shows cooperation regarding intra- and inter-department activities
- Displays sensitivity to attitudes and concerns
- Demonstrates consistency and fairness
- Provides timely and honest feedback in a constructive way
- Understands and cultivates relationships
- Maintains confidentiality
- Accepts constructive criticism
- Negotiates effectively
- Adapts communications to diverse audiences
- Demonstrates verbal/nonverbal consistency
- Manages meetings effectively
- Possesses effective listening skills
- Writes and speaks clearly and concisely
- Delivers quality oral presentations

Diversity

- Achieves affirmative action objectives
- Promotes workforce diversity through recruitment and retention practices
- Demonstrates sensitivity and mutual respect for all individuals
- Participates in diversity programming and initiatives

Decision Making

- Involves appropriate others in the decision-making process
- Uses a logical rational approach
- Makes timely/responsive decisions
- Takes responsibility for decisions
- Modifies decisions based on new information when appropriate
- Takes calculated risks

Leadership

- Coaches and mentors, inspires and motivates
- Delegates responsibility with associated authority
- Leads by example, serves as appropriate role model
- Promotes a cooperative and team oriented work environment
- Sets clear, reasonable expectations and follows through
- Remains visible and approachable and interacts with others on a regular basis
- Demonstrates high ethical standards
- Gains support and buy-in through participation of others
- Works collaboratively to achieve improved results

Managing People

- Recruits, selects and retains capable, productive employees
- Participates and/or achieves affirmative action objectives
- Promotes employee safety and wellness
- Demonstrates knowledge of personnel policies, labor agreements and merit system rules
- Promotes workforce diversity
- Recognizes and rewards good performance
- Assesses and provides for employee development and training
- Encourages and assists employees to achieve full potential
- Evaluates employees timely and thoroughly
- Takes timely, appropriate and corrective action(s)
- Conducts a mid-year review each January

Outcomes Assessment

- Assesses and evaluates programmatic efforts using approved department outcomes measures
- Provides periodic quantitative data to determine programs/objectives effectiveness
- Informs administrators of outcomes, successes and areas of improvement
- Continually improves programmatic efforts based on data from assessment

Planning

- Maintains a clear focus on internal and external university community members needs
- Plans and budgets for future resource requirements
- Anticipates problems and develops contingency plans
- Sets priorities effectively
- Establishes challenging, attainable goals and objectives
- Identifies short-term and long-range organizational needs
- Uses resources efficiently and manages effectively within budget limits
- Looks to the future with a broad perspective

Work Processes and Results

- Achieves results as related to predetermined goals
- Provides services that consistently meet or exceed the needs and expectations
- Understands needs and ensures satisfaction
- Uses problem solving methods to improve processes
- Collects and evaluates relevant information to make decisions
- Uses good judgment
- Sets and adheres to priorities
- Meets productivity standards, deadlines and work schedules
- Produces accurate and timely work with minimal supervision
- Pursues efficiency and economy in the use of resources
- Informs supervisor or appropriate others of problems, identified issues and alternative solutions

Management Performance Evaluation and Development Form

Purpose of Appraisal: <input type="checkbox"/> Annual Review <input type="checkbox"/> Mid-year review <input type="checkbox"/> Probationary Review <input type="checkbox"/> Other:	Employee's Name:	Evaluation Period:
		From To
	Job Title:	Department/Division:
	Evaluator's Name:	Evaluator's Title:

Part I: Performance Evaluation

Assessment of manager's contribution in helping the organization to achieve its goals and be successful. Describe how well the manager has done in carrying out job responsibilities and performance expectations. Consider performance *demonstrated* with regard to the applicable Performance Elements from page 2 when conducting this assessment.

Rating scale: 1-Below Expectations; 2-Needs Improvement; 3-Meets Expectations; 4-Exceeds Expectations; 5-Significantly and Consistently Exceeds Expectations.

Comments on Specific Performance Elements Below:	Rating
<i>Communication/Interpersonal Skills:</i>	
<i>Diversity:</i>	
<i>Decision Making:</i>	

Leadership:

Managing People:

Outcomes Assessment:

Planning:

Work Processes and Results:

Other:

Part I Rating:

(Rating Scale: 1-Below Expectations; 2-Needs Improvement; 3-Meets Expectations; 4-Exceeds Expectations; 5-Significantly and Consistently Exceeds Expectations)

NOTE: Overall rating in this section must be equal to, or above the individual ratings reflected in a whole number.

Part II: Goal Performance Results

Goal development and evaluation is based on a clear and measurable goal and objective with established accountability and performance assessments. The supervisor uses the manager's narrative statement summarizing pre-established goals and accomplishments to determine the appropriate rating.

Areas of Performance Goal Statements	Expected Results	Actual Results	Rating
Goal:			
Goal:			
Goal:			

Goal:			
--------------	--	--	--

Goal:			
--------------	--	--	--

Part II Rating:

(Rating Scale: 1-Below Expectations; 2-Needs Improvement; 3-Meets Expectations; 4-Exceeds Expectations; 5-Significantly and Consistently Exceeds Expectations)

NOTE: Overall rating in this section must be equal to or above the individual rating reflected in a whole number..

Overall Rating:

Comments:

This **Overall Rating** must be a whole number (1-5) based on the above referenced scale, The **Overall Rating** serves as a base for merit salary increase considerations.

Part III: Future Performance Expectations

Identify any particular performance expectations, job duties, special assignments and/or skills upon which the manager should focus to reinforce his/her success and contribution to the organization. The Performance Elements listed on page 2 may help in identifying future expectations.

Part IV: Future Training and Development

Identify training and development opportunities in which the manager should participate to enhance future performance.

Part V: Organizational Support

To be completed by the manager: What suggestions do you have as to how your supervisor, co-workers, and/or management can support you in the present job and with future career goals?

Part VI: Comments and Signatures

Employee's Comments:

- I am in general agreement with this evaluation.
- I am not in general agreement with this evaluation and request a meeting with my reviewing officer.

Please explain and provide a brief statement of the disagreement:

Employee's Signature:

Supervisor's Signature:

Reviewer's Signature:

Title:

Date:

Reviewer's Comments:

NOTE: After the performance evaluation is completed and signed by all parties, it is the evaluator's responsibility to provide a copy to the manager and to ensure that the original is placed in the employee's official personnel file.

Personal Narrative

Continued:

Part _____ Section _____

Part _____ Section _____

Part _____ Section _____