Management Performance Evaluation and Development Form

Office of the Chancellor

## Instructions 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 one page narrative summarizing his/her 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 III 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. Performance expectations should be aligned to organizational goals as part of planning for the coming review cycle.
4. Only the manager completes Part IV 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.
6. The manager and supervisor meet to review Parts I through III 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 encouraged to share his/her response to Part IV of the form during the feedback session.
7. 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.
8. Following the feedback session, the supervisor prepares the final form, provides the performance rating and shares it with the manager. Ratings are: N/A – Not Applicable, 5 - Significantly and Consistently Exceeds Expectations, 4 – Exceeds Expectations, 3 – Fully Performing/Meets Expectations, 2 – Needs Improvement, 1 – Below Expectations, TNE – Too New to Evaluate. If the manager has not shared his/her response to Part IV of the form with the supervisor, it should now be included on the form.
9. 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 or comments relative to the manager’s performance. The supervisor ensures that the manager receives a copy, and the original is placed in the manager’s personnel file.

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| **Performance Elements**  The following “performance elements” should be considered, where applicable, in assessing employee performance (Part I) and determining future performance expectations and development needs (Parts II and III). Other performance elements may be added as needed. | | | | | | |
| Business Processes, Technology, Customer Service and Results  * Provides services that consistently meet or exceed the needs and expectations of customers * Recognizes that student success is the foundation of individual and organizational success * Uses customer satisfaction as a key measure of quality * Uses appropriate problem solving methods to improve processes * Collects and evaluates relevant information to make decisions * Uses good judgment * Meets productivity standards, deadlines and work schedules * Produces accurate and timely work with minimal supervision * Achieves results * Informs supervisor or appropriate others of problems identifying issues and alternative solutions * Strives for continuous improvement; streamlines work processes and eliminates waste appropriately  Communication/Collaboration/Interpersonal Skills  * + Adapts communications to diverse audiences   + Delivers quality presentations   + Demonstrates verbal/nonverbal consistency   + Shares appropriate information internally and externally   + Manages meetings effectively * Relates and works well with others * Demonstrates trust, sensitivity and mutual respect * Provides timely and honest feedback in a constructive and nonthreatening way * Maintains confidentiality * Accepts constructive criticism   + Possesses active listening skills   + Writes and speaks clearly and concisely   **Policy and****Decision Making**   * Takes calculated risks | | * Uses a logical rational approach * Makes timely/responsive decisions * Takes responsibility for decisions * Modifies decisions based on new information when appropriate * Involves appropriate others in the decision-making process * Demonstrates consistency and fairness   **Leadership**   * Coaches and mentors, inspires and motivates * Delegates responsibility with associated authority * Demonstrates self-confidence * Leads by example, serves as appropriate role model * Promotes a cooperative 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  Planning and Program/Project Management  * Maintains a clear focus on internal and external customer 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- and long-range organizational needs * Looks to the future with a broad perspective * Responds effectively to unforeseen problems * Understands customer needs and ensures customer satisfaction * Sets and adheres to priorities | | | **Resource Management**   * Uses resources efficiently and manages effectively within budget limits * Pursues efficiency and economy in the use of resources (i.e. monetary, facilities, people, technology, etc.) * Supports PASSHE’s green initiative efforts  Manages vendor relationships effectivelyHuman Resources and Labor Relations Management  * Recruits, selects and retains capable, productive employees * Achieves affirmative action objectives * Promotes employee safety and wellness * Demonstrates knowledge of personnel policies, labor agreements and merit principle system rules * Promotes inclusion and 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, corrective/disciplinary action * Negotiates effectively * Adheres to policy and collective bargaining agreements   **Interacting with External Environment**   * Works effectively within the political environment * Exhibits knowledge and shows cooperation regarding intra- and inter-agency programs, activities, and responsibilities * Displays sensitivity to public attitudes and concerns * Understands and cultivates stakeholder relationships * Works collaboratively to achieve improved results | |
| Management Performance Evaluation and Development Form | | | | | | |
| **Purpose of Appraisal:**  Annual Review | | **Employee’s Name:** | **Evaluation Period:**  **From**       To | | | |
| Probationary Review | | **Job Title:** | **Organizational Unit:** | | | |
| Other: | | **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**: N/A – Not Applicable, 5 - Significantly and Consistently Exceeds Expectations, 4 – Exceeds Expectations, 3 – Fully Performing/Meets Expectations, 2 – Needs Improvement, 1 – Below Expectations, TNE – Too New to Evaluate | | | | | | |
| **Rate and Provide Comments on the Specific Performance Elements Below:** | | | | |
| *Business Processes, Technology and Results:* | | | | |
| *Communication, Collaboration and Interpersonal Skills:* | | | | |
| *Policy and Decision Making:* | | | | |
| *Leadership:* | | | | |
| *Planning and Program/Project Management:* | | | | |
| *Resource Management:* | | | | |
| *Human Resources and Labor Relations Management:* | | | | |
| *Interacting with External Environment:* | | | | |
| *Other:* | | | | |
| *Other:* | | | | |
| **Overall Performance Rating Based Upon Evaluation of Above Performance Elements :**  **Rating Scale**: N/A – Not Applicable, 5 - Significantly and Consistently Exceeds Expectations, 4 – Exceeds Expectations, 3 – Fully Performing/Meets Expectations, 2 – Needs Improvement, 1 – Below Expectations, TNE – Too New to Evaluate | | | | |

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| **Part II: 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. | | |
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| **Part III: Future Training and Development**  Identify training and development opportunities in which the manager should participate to enhance future performance. | | |
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| **Part IV: 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? | | |
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| **Part V: Comments and Signatures** | | |
| This report is based on my best judgment.  **Evaluator’s Signature:** | **Title**: | **Date**: |
| This report has been discussed with me.  **Employee’s Signature:** | **Title**: | **Date**: |
| **Employee’s Comments**: | | |
| **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 personnel file.*