

# Management Performance Evaluation

NAME \_\_\_\_\_ DEPARTMENT \_\_\_\_\_

JOB CLASSIFICATION \_\_\_\_\_ HIRE DATE \_\_\_\_\_

DATE OF EVALUATION \_\_\_\_\_ DATE OF LAST EVALUATION \_\_\_\_\_

TYPE OF EVALUATION ☐ Annual ☐ End of Probation Period ☐ Other

## Ratings guide

5 - Exceptional      4 - Superior      3 - Satisfactory      2 -Improvement Needed      1- Unsatisfactory

<i>Elements of Evaluation</i>	5	4	3	2	1
<b>CLIENT/CUSTOMER SERVICE</b> Understands the client/customer relationship; practices establishing positive relations inter/intra-departmentally; responsive and courteous to client inquiries.					
<b>INTERPERSONAL SKILLS</b> Secures trust and respect by maintaining teamwork among peers; confronts difficult interpersonal conflicts for positive resolution; practices collaborative management style by utilizing the expertise of superiors, peers, and subordinates; provides fair and uniform treatment of subordinates.					
<b>TRAINING AND DEVELOPMENT</b> Recognizes required technical training and career development needs of subordinates; engages in self-development; self-appraises performance; recognizes good and complete work.					
<b>PROFESSIONAL DEVELOPMENT</b> Gains and maintains current knowledge of procedures and policies; seeks personal and professional growth and development through training and development of self and subordinates; adjusts to changes; effectively manages stress; cognizant of own knowledge and is willing to seek assistance from superior, peers, and subordinates when necessary; demonstrates willingness to work in support of the organization and campus programs.					
<b>PROFESSIONAL STANDARDS</b> Observes work hours and schedule; adheres to the standards of professional dress as outlined by the home organization; meets technical and/or professional standards of work in an efficient manner; utilizes methods which enhance quality; work product is accurate and thorough; work is completed in a timely fashion. Work performance is consistent in high quality and quantity of professional work.					
<b>INFORMATION/COMMUNICATION</b> Communicates effectively both orally and in writing; maintains courteous relations and coordinates work activities with appropriate individuals, departments, and relevant organizations; listens and responds to superiors', peers', and subordinates' ideas, needs, and suggestions; effectively participates in meetings; keeps superior, peers, and management informed where necessary.					
<b>PLANNING &amp; ORGANIZATION</b> Plans and organizes necessary activities and objectives to meet goals; thinks through work barriers and keeps work advancing toward priority objectives; develops and maintains logical and efficient systems.					
<b>PROBLEM RESOLUTION</b> Develops and implements practical and effective solutions; appropriately responds to new and different situations; attempts to positively resolve problems, issues, and complaints without referral to a higher source based upon the compilation of data and analysis. Consistently reaches sound decisions for solutions to problems.					
<b>FINANCIAL AND MATERIAL RESOURCES</b> At level appropriate to job, demonstrates fiscal responsibility and efficient utilization of resources; plans and controls expenditures and materials; encourages and demonstrates cost efficient performance. Meets work commitments within established budgetary limitations.					
<b>SAFETY</b> At level appropriate to job, demonstrates responsibility for safety and security of peers and equipment; encourages & attends appropriate training; maintains current information regarding safety policies & procedures. Acknowledges the importance of safety at all levels.					

# Self-Appraisal

**Results** – To what extent did you accomplish or fail to accomplish expected results during the evaluation period. (Be specific and give facts, figures and examples.)

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**Methods** – How do you go about completing your job? Identify how you plan, delegate, follow through, communicate, work with people at various levels?

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## Performance Strengths

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## Performance Challenges

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## Current Year

Major objectives	Actual Accomplishments

**Next Year**

Major objectives	Basis of Measurement

**Development Needs** - In what areas is development needed, either relative to the present position or aspirations.

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**Proposed Development** – List specific actions to meet the above development needs over the next 2-3 years.

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**Replacement Possibilities** – List individuals that could replace you if the need arose.

**Emergency** \_\_\_\_\_

**Ready Now** \_\_\_\_\_

**Within 1-5 years** \_\_\_\_\_

*This worksheet was initially completed on \_\_\_\_\_.*

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

*This worksheet was finalized jointly by us during the performance evaluation on \_\_\_\_\_. We believe it records our mutual understanding in the areas covered.*

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's Signature

\_\_\_\_\_  
Date

**For Human Resources Use Only**

Evaluation received on: \_\_\_\_\_

Follow-up Action Form received: \_\_\_\_\_

Action approved by: \_\_\_\_\_