MANAGER PERFORMANCE MANAGEMENT AND DEVELOPMENT INSTRUMENT

Name:	**University ID #**: (HR Use)
Position Title/Department:	**Position #**: (HR Use)
Division:	**Reviewer/Title**:
Period Covered **From**: **To**:	**Date of Review**:

GENERAL INSTRUCTIONS

- **This instrument is to be used for initial, annual and interim performance evaluations for University Managers only. Probationary evaluations should occur six months into a manager's employment with the University. Interim evaluations may occur as determined by the manager's immediate supervisor but may be used to evaluate performance six months after a change in responsibilities or as a remedial tool when a manager is experiencing performance problems.**
- **The annual evaluation cycle is from July 1 of one year through June 30 of the following year.**
- **Part II should be completed within 30 days of a manager's hire or within 30 days after the beginning of each new annual performance cycle.**
- **Manager completes self-evaluation portions in Part I and II. The Rater's may change his or her ratings after taking into consideration the Manager's self-evaluation and comments, but ultimately, the Rater's scoring is final.**
- **Ratings are to be assigned by the Rater for each individual performance factor in Part I; for each individual performance objective in Part II; and for the overall rating in Part III. The overall rating may be assigned a decimal value such as "2.3", for example.**
- **Performance objectives and performance factors may be weighted at the rater's discretion.**
- **The reviewer is typically the rater's immediate supervisor.**

PART I: CORE PERFORMANCE FACTORS

Manager Self-Evaluates and Rater Evaluates the manager's proficiency in the following performance factors using the rating scale below. Lines next to boxes without numbers may be used to assign a value between 1 and 2 or 2 and 3, such as 1.8 or 2.6.

3.0 **Significantly Exceeds Expectations**: Performance consistently above standards in all or nearly all areas and far exceeds normal expectations.

2.5-2.9 **Above Expectations:** Performance fully meets expectations and is generally above standards in multiple areas.

2.0-2.4 **Meet Expectations:** Performance fully meets standards in all areas.

0-1.9 **Below Expectations**: Performance is below standards in a number of expectations, but may meet standards in others; or performance is below standards in a number of critical aspects where substantial improvement required.

Performance Factors	Ratings Employee	Ratings Rater
1. Leadership Displays courage, passion and caring in work. Sets a professional example. Motivates others to work toward common goals. Demonstrates integrity, consistency and fairness. Uses authority responsibly. Addresses problems proactively. Gains support and seeks buy-in-through participation of others Demonstrates interest in professional growth of others. Shows good judgment and accepts ownership for decisions in areas of responsibility. **Supportive information:**	____	____
2. Commitment to the University's Mission, Vision and Values Articulates or shows appreciation for the importance of shared vision. Demonstrates civility in relations with others. Requires supervised employees to show civility in their relations toward others. Participates regularly in activities beyond immediate areas of responsibility which support the mission of the University. Demonstrates consideration of the University's values when making decisions. * (Diversity and civility are examples of University values to be considered.) **Supportive information:**	____	____
3. Management Practices Demonstrates commitment to good customer services. Demonstrates competency in labor-management relations activities necessary to effectively manage the areas of responsibility. Questions existing practices for continued relevancy. Effectively initiates and promotes necessary change in the areas of responsibility. Sets and enforces performance standards effectively. Recognizes and rewards good performance. Plans effectively and shows good project management skills. Shows awareness of "good practices" for areas of responsibility. Encourages employees to improve performance and grow by actively supporting and encouraging employees to participate in training and development activities. **Supportive information:**	____	____
4. Relational Skills Works effectively with others. Works collaboratively and negotiates effectively. Maintains confidentiality. Accepts constructive criticism without offense. Demonstrates sensitivity to the rights and opinions of others, even in disagreement. Presents a positive image of the University to external publics. Respects cultural differences and embraces activities which support a diverse community. **Supportive information:**	____	____
5. Commitment to Diversity Respects cultural differences and embraces activities which support a diverse community. Utilizes recruitment strategies designed to attract diverse applicant pools. Actively engages in diversity initiatives such as mentoring, training and employee networks. Displays a commitment to diversity. **Supportive information:**	____	____

6. Resource Management Recruits, selects and retains capable, productive employees. Effectively deploys staff, equipment and technology to accomplish work. Shows good stewardship of financial resources. Demonstrates knowledge of budget and use of financial reporting system. Displays creativity/innovation in managing resources. **Supportive information:**	____	____
7. Communication Skills Shares appropriate information with internal and external audiences in a timely and responsible manner. Manages meetings effectively. Possesses effective listening skills. Articulates clearly and writes effectively. Displays effective presentation skill. **Supportive information:**	____	____
8. Accountability Takes responsibility for fulfilling job duties. Meets attendance and punctuality guidelines. Demonstrates accuracy and thoroughness. Completes work on time. Follows instructions and directions. **Supportive information:**	____	____
9. Responsiveness/Customer Service Consistently demonstrates respect, responsiveness and professionalism. Provides each customer with the same high quality services. Fosters and models a commitment to customer service. Builds customer confidence and increases customer satisfaction. Makes customers and their needs a primary focus. Developing and sustaining productive customer relationships. **Supportive information:**	____	____
10. Decision Making/Problem Solving Identifies and understands issues, problems, and opportunities. Make timely and rational decisions based on analysis of relevant information/data. Accepts responsibility for decisions and takes proper action when necessary. Uses effective approaches for choosing a course of action or developing appropriate actions. Takes action that is consistent with available facts, constraints, and probable consequences. **Supportive information:**	____	____
11. Work Environment/Safety Promotes and supports a respectful workplace; complies with laws, policies and procedures. Models ethical behavior and decision-making and ensures compliance. **Supportive information:**	____	____

PART II: JOB SPECIFIC PERFORMANCE OBJECTIVES

Instructions:

Part II creates the performance deliverables which will be measured. The manager being rated and the immediate supervisor should identify below between 5 and 8 significant deliverables in the form of major initiatives or projects. They may include annual program objectives or project-related work. The intent is that there should be some collaboration between the manager and the rater when assigning the deliverables and they should be prioritized if at all possible, with the most important in block 1, next most important in block 2, etc. If more than 8 deliverables require listing, those in excess of 8 may be listed on the back of the last page. (Note: It is typical for some priorities to change over the course of the year, and it is also foreseeable that some objectives set at the beginning of the cycle may prove unachievable for reasons outside the employee's control.)

Job Specific Performance Objectives	Rating
1. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	
Rater:	
2. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation) :	
Rater:	
3. Objective:	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	

Rater:	
4. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	
Rater:	
5. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	
Rater:	
6. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	
Rater:	
7. **Objective:**	
Expected Results:	
Actual Results:	
Employee (Self-evaluation):	
Rater:	
8. **Objective:**	
Expected Results:	

Actual Results:	
Employee (Self-evaluation):	
Rater:	

The manager and the Rater have met, discussed and agreed to the above initiatives as measurable deliverables for the performance cycle.

Employee's Signature:	Date:
Supervisor's Signature:	Date:

PART III: SUMMARY OF OVERALL PERFORMANCE

The space below is provided for a narrative summary of the manager's performance over the immediate cycle to be completed by the immediate supervisor (rater).

PART IV: OVERALL PERFORMANCE RATING

Overall Score: ____

PART V: PERFORMANCE DEVELOPMENT PLAN

In the blocks below, the immediate supervisor (rater) should make specific recommendations designed to identify strategies to enhance the manager's current competencies (first block) or correct performance issues (second block).

Professional Growth Strategies

Remedial Strategies

PART VI: SIGNATURES

The manager and immediate supervisor are required to sign the instrument after completing it and concluding the performance interview. The manager is only attesting to having been afforded the opportunity to review the evaluation and discuss the evaluations the immediate supervisor. The manager's signature does not necessarily indicate that the manager agrees with the superior's measurement of the manager's performance. Employee comments are optional.

Rater's Signature:	Date:
Reviewer's Signature:	Date:
Employee's Signature:	Date:

Employee Comments:

I would like to discuss this report with the Reviewing Officer: ☐ Yes ☐ No

As requested, Reviewing Officer discussed report.
Reviewing Officer 's Signature: Date:

Print Form Clear Form