

California State University, Fresno Auxiliary Services

Performance Evaluation (Managers)

Employee Name:	Department:	Evaluation Period: to	Type of Appraisal: ☐ 6 Month ☐ Annual ☐ Other
Working Title:			
RATING CRITERIA			

Exceeds Expectations: Performance in this area often exceeds expectations and requirements of the position.

Achieves Expectations: Performance meets and sometimes may exceed expectations and requirements of the position.
Fully competent.

Needs Improvement: Performance in this area often does not meet expectations and requirements of the position.
Improvement is necessary.

	Exceeds Expectations	Achieves Expectations	Needs Improvement
PROFESSIONAL EFFECTIVENESS: Ability to work effectively with others; ability to achieve outcomes; demonstrates professionalism; demonstrates self-awareness; receives feedback well; is self-reflective; seeks growth opportunities; willingness to change; commitment to personal and professional development.	☐	☐	☐
Comments:			
COMMUNICATION: Effective in a variety of communication settings; attentively listens to others; provides timely and helpful information to others across the organization; encourages the open expression of diverse ideas and opinions.	☐	☐	☐
Comments:			
VALUES DIFFERENCES: Seeks to understand different perspectives and cultures; contributes to a work climate where differences are values and supported; applies other's diverse experiences, styles, backgrounds and perspectives to get results; is sensitive to cultural norms, expectations and ways of communicating.	☐	☐	☐
Comments:			
JOB KNOWLEDGE AND INITIATIVE: Possesses the knowledge, skills and abilities required to achieve performance objectives; demonstrates understanding of applicable policies, procedures and legislation; demonstrates willingness to learn new skills, expand knowledge and take on additional responsibility when necessary.	☐	☐	☐
Comments:			

PLANNING AND ORGANIZATION: Ability to anticipate needs and plan, prioritize, organize, and monitor work. Possesses attention to detail and follow-through; if applicable, effectively manages budget.	☐	☐	☐
Comments: 			
LEADERSHIP: Drives vision and purpose; ability to inspire, motivate and establish trust; ability to be creative, responsive and influence; ability to be a leader formally/informally.	☐	☐	☐
Comments: 			
MANAGE/SUPERVISE: Ability to take responsibility; ability to delegate, to direct work and to evaluate and train direct reports; ability to effectively problem solve.	☐	☐	☐
Comments: 			
STAFF DEVELOPMENT: Ability to hire and retain competent staff and commit to staff professional growth and development. Develops others through coaching and feedback.	☐	☐	☐
Comments: 			

GOALS AND OBJECTIVES FOR NEXT APPRAISAL PERIOD

Mutually develop performance goals for the next appraisal period. Identify areas for growth. If performance is in need of improvement, establish an improvement plan at this time. The plan should include new goals as well as a commitment to improve performance in those areas which are currently weak. **Take the opportunity to discuss any available resources that may be beneficial in achieving these goals and objectives.**

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OVERALL PERFORMANCE EVALUATION RATING

Using the following standards, please select the summary description that most closely describes the employee's overall performance for this entire review period:

- ☐ **Exceeds Expectations:** *Performance often exceeds expectations and requirements of the position.* Incumbent frequently demonstrates the ability to integrate a variety of skills to effectively solve problems and carry out duties, responsibilities and objectives beyond the expectations of the position. Incumbent's performance is consistent with the behavior associated with the selected critical performance factors. Incumbent adds value to the organization beyond what is expected and is one of the key contributors within the organization.

- ☐ **Achieves Expectations:** *Performance meets and sometimes may exceed the position's requirements and expectations.* Incumbent adds value to the organization and is a fully competent performer. Critical goals, tasks, and projects are achieved within acceptable standards. During the review period, there may have been some accomplishments that exceeded expectations, some that may have met expectations and, possibly, some areas where results may not have fully met expectations. Overall, the incumbent demonstrates the ability to handle projects or assignments within the scope of the position and demonstrates the ability to integrate a variety of skills to solve problems and carry out duties, responsibilities and objectives. Incumbent's performance is generally consistent with the behavior associated with the selected critical performance factors. Incumbent adds value to the organization and is a fully competent performer.
- ☐ **Needs Improvement:** *Performance often does not meet expectations and requirements of the position. Improvement is necessary.* Incumbent needs further development and/or improvement in one or more of the critical performance factors. Incumbent requires more than the normal amount of guidance and follow-up to ensure that assignments are progressing adequately. Performance is occasionally consistent with the behavior associated with the selected critical performance factors. Sustained progress and improvement are required in one or more of the critical performance factors.

**Please explain why the employee is not meeting expectations with specific examples in Evaluator Comments Box.*

EVALUATOR'S COMMENTS

(Comment on the Performance Factors, cite examples where appropriate, and include future performance and professional development objectives).

EMPLOYEE'S COMMENTS

(May also attach a separate sheet).

I certify that this evaluation has been discussed with me. My signature does not necessarily indicate that I agree with the evaluation.

Employee's Signature

Date

Director's Signature

Date

HR Review _____