



## Cheyney University of Pennsylvania Management Performance Appraisal Guidelines

The performance appraisal process is expected to be a collaborative effort with input from both employee and supervisor. The process is intended to:

1. Improve communications between employees and supervisors.
2. Provide an opportunity for employees and their supervisors to discuss job responsibilities so that both can clearly understand performance expectations.
3. Provide candid and timely feedback on employee performance in relations to performance expectations and objective attainment.
4. Provide an opportunity for employees to discuss and obtain assistance in solving problems encountered on the job and to identify areas for training and professional development.
5. Provide a sound basis for personnel decisions (e.g., pay, promotion and retention decisions).
6. Emphasize the high standards of Cheyney University rather than the minimum requirements for effectiveness.

### **An effective performance appraisal process should result in:**

1. Improved understanding of job requirements and mutually defined goals.
2. Better employee performance.
3. Increased employee job satisfaction.

CHEYNEY UNIVERSITY of Pennsylvania expects competent and professional work from all employees. A supervisor must discuss the expected level of performance for each criterion at the time of hire and during each appraisal session.

This performance appraisal process for employees in the Manager classification is designed to record the level of job performance and to help individuals meet CHEYNEY UNIVERSITY'S high standards of performance. The scale in this appraisal consists of three levels:

<b>ABOVE STANDARD</b>	<b>Performance exceeds standards.</b> Employee exhibits significant and consistent strengths. Employee performs responsibilities with exceptional and unusual competence. Employee contributes beyond job demands.
<b>MEETS STANDARD</b>	<b>Employee fully and completely meets all requirements.</b> "Meets standard" rating means that kind of performance expected of every employee of CHEYNEY UNIVERSITY of Pennsylvania.
<b>BELOW STANDARD</b>	<b>Employee is failing to meet standards</b> and corrective action is necessary.

***Blank columns may be used to assign a value between 1 and 2 or 2 and 3. For example an employee may be assigned a rating of 2.5.***



# Cheyney University of Pennsylvania MANAGEMENT PERFORMANCE APPRAISAL

Employee Name: \_\_\_\_\_  
 Division: \_\_\_\_\_  
 Department: \_\_\_\_\_  
 Position Title: \_\_\_\_\_  
 Rating Period: \_\_\_\_\_ To: \_\_\_\_\_

**Office of Human Resources Use Only:**

**Date Returned:** \_\_\_\_\_

Probationary     Annual     Other

### GENERAL INSTRUCTIONS

- **Appraisers must identify a Reviewing Officer.** Discuss/obtain comments and signature/date of reviewing officer **BEFORE** discussion with employee. **\*REVIEWING OFFICER'S SIGNATURE MUST BE OBTAINED PRIOR TO DISCUSSING WITH EMPLOYEE.**
- Review with the employee the employee's job description, job standards (expectations/objectives/duties) for the rating cycle to ensure the appraisal relates to the specific responsibilities, job assignments, and standards that were conveyed to the employee for the rating cycle.
- Base the appraisal on the employee's performance during the review period. Obtain/review necessary input and supporting data.
- Rate each factor in relation to the standards established and the guidelines listed on the form for each rating.
- Provide an overall rating based on the rating of the individual factors, adherence to significant performance standards, and accomplishment of essential functions. Each factor need not be of equal weight but comments should justify significant differences impacting on the overall rating.
- Assess employee strengths and identify opportunities where the employee could improve or requires additional knowledge or skill. When rating employees, consider their participation and willingness to participate in employee development opportunities.
- Comment sections should be used to support performance ratings, indicate problem areas and provide guidance to employees on how to improve performance. Comments **MUST** be provided for above standard and below standard ratings, and are highly recommended for all other ratings.
- Sign/date the form, meet with the employee to discuss the rating, and obtain the employee's signature/date/comments. Arrange for reviewing officer discussion, if requested.
- If applicable, update employee's job description, essential job functions, and performance standards/ objectives for the next rating cycle.

### SECTION I: PERFORMANCE FACTORS

**Instructions to Supervisor:** Check the appropriate block to indicate the employee's level of performance in the categories listed and in comparison to expected job performance.

A. JOB PERFORMANCE FACTORS	ABOVE STANDARD (3)	_____	STANDARD (2)	_____	BELOW STANDARD (1)	NOT APPLICABLE (N/A)
<b>TOTAL SCORE:</b> _____						
<b>Problem Solving</b> – Consider the ability to identify important factors in a problem or situation and the ability to resolve and/or make suggestions for resolution.  <b>Comments:</b>						
<b>Job Knowledge</b> – Consider basic knowledge of present job and equipment necessary to do the job.  <b>Comments:</b>						
<b>Fiscal Management</b> – Ability to develop a sound operating budget and/or implement cost effective changes as needed.  <b>Comments:</b>						

<b>A. JOB PERFORMANCE FACTORS (CONT'D)</b>	<b>ABOVE STANDARD (3)</b>	<b>_____</b>	<b>STANDARD (2)</b>	<b>_____</b>	<b>BELOW STANDARD (1)</b>	<b>NOT APPLICABLE (N/A)</b>
<b>TOTAL SCORE:</b> _____						
<b>Work Results</b> – Measures employee's results in meeting established goals/ objectives/ expectations/standards of quality, quantity, customer services and timeliness.  <b>Comments:</b>						
<b>Implementation of Policies &amp; Practices</b> – Consider the ability to develop, change and/or comply with established objectives, policies and practices of the University.  <b>Comments:</b>						
<b>Safety</b> – Consider the ability to comply with safety rules, policies, procedures, and practices.  <b>Comments:</b>						

<b>B. INTERPERSONAL FACTORS</b>	<b>ABOVE STANDARD (3)</b>	<b>_____</b>	<b>STANDARD (2)</b>	<b>_____</b>	<b>BELOW STANDARD (1)</b>	<b>NOT APPLICABLE (N/A)</b>
<b>TOTAL SCORE:</b> _____						
<b>Communication</b> – Consider the degree of effectiveness in listening and in communicating orally and in writing. Consider the ability to transfer information and ideas formally or informally to diverse audiences.  <b>Comments:</b>						
<b>Initiative</b> – Consider the ability to act independently and without specific instructions or direction in the best interest of the university community.  <b>Comments:</b>						
<b>Teamwork</b> – Consider willingness and cooperativeness with co-workers and supervisors; ability to accept constructive criticism and willingness to participate in campus wide initiatives.  <b>Comments:</b>						

<b>C. WORK HABITS</b>	<b>ABOVE STANDARD (3)</b>	<b>_____</b>	<b>STANDARD (2)</b>	<b>_____</b>	<b>BELOW STANDARD (1)</b>	<b>NOT APPLICABLE (N/A)</b>
<b>TOTAL SCORE:</b> _____						
<b>Public Relations</b> – Consider the treatment of the public and members of other agencies to promote a positive university brand.  <b>Comments:</b>						

<b>Adaptability</b> – Consider the ability to interpret and respond quickly to new or changed situations, requirements, methods and procedures.						
	<b>Comments:</b>					
<b>Attitude</b> – Consider the demeanor used in dealing with the public, co-workers, and supervisors as well as internal and external customers.						
	<b>Comments:</b>					
<b>Employee Conduct</b> – Consider the ability to comply with work rules and personnel policies and procedures.						
	<b>Comments:</b>					
<b>Attendance</b> – Consider dependability (daily attendance & punctuality)						
	<b>Comments:</b>					

<b>D. MANAGEMENT PERFORMANCE</b>	<b>ABOVE STANDARD (3)</b>		<b>STANDARD (2)</b>		<b>BELOW STANDARD (1)</b>	<b>NOT APPLICABLE (N/A)</b>
<b>TOTAL SCORE:</b> _____		_____		_____		
<b>Organizational &amp; Administrative Skills</b> – Consider the ability to establish operational goals and objectives, prioritize work, anticipate problems and implement plans effectively.						
	<b>Comments:</b>					
<b>Management Skills</b> – Consider the ability to accept responsibility and contribute to operational goals and objectives.						
	<b>Comments:</b>					
<b>Human Resource Development</b> – Consider ability to complete and submit performance reviews for assigned staff in a timely manner.						
	<b>Comments:</b>					

<b>E. LEADERSHIP</b> <b>TOTAL SCORE:</b> _____ <i>(IF THE EMPLOYEE'S DUTIES INCLUDE SUPERVISION)</i>	<b>ABOVE STANDARD (3)</b> _____	<b>STANDARD (2)</b> _____	<b>BELOW STANDARD (1)</b> _____	<b>NOT APPLICABLE (N/A)</b>
<b>Leadership Skills</b> – Consider the degree to which influence is used to achieve job related outcomes or the goals and objectives of the University.  <b>Comments:</b>				
<b>Established Goals</b> – Measure employee's results in meeting established goals for the current review period.  <b>Comments:</b>  Goal #1: _____ _____ Completed: _____ In Progress: _____ Amended: _____ Goal #2: _____ _____ Completed: _____ In Progress: _____ Amended: _____ Goal #3: _____ _____ Completed: _____ In Progress: _____ Amended: _____ Goal #4: _____ _____ Completed: _____ In Progress: _____ Amended: _____ Goal #5: _____ _____ Completed: _____ In Progress: _____ Amended: _____  * <b>Note:</b> Please attach a separate sheet to this document to list additional established goals.				

<b>F. OVERALL PERFORMANCE</b> <b>TOTAL SCORE:</b> _____	<b>ABOVE STANDARD (3)</b> _____	<b>STANDARD (2)</b> _____	<b>BELOW STANDARD (1)</b> _____
<b>Check the appropriate block to indicate the employee's overall level of performance during the evaluation period.</b>  <b>Comments:</b>			

**SECTION II: SUPERVISOR'S COMMENTS/SUGGESTIONS**

**Employee Strengths:** Indicate the employee's progress/achievements and areas which deserve recognition or praise since the last review. Indicate the employee's strengths and not activities/responsibilities planned to build on these strengths.

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**Areas of Improvement:** Identify specific areas in which the employee's performance should or could be improved.

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**SUPERVISOR'S COMMENTS (ADDITIONAL):**

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**SECTION III: PROBATIONARY STATUS (IF APPLICABLE)**

**Instructions to Reviewer:** Indicate whether or not the employee's probationary status is "successful", "unsuccessful" or extended. If the employee's probationary status is "extended", indicate the established date to correct any concerns and/or performance related issues and indicate the date of the next review.

<b>SUCCESSFUL</b>	<b>UNSUCCESSFUL</b>	<b>EXTENDED</b>	<b>TIME FRAME TO CORRECT (DATE):</b> _____ <b>NEXT EVALUATION (DATE):</b> _____
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**SECTION III: EMPLOYEE'S COMMENTS**

**Professional Development:** Identify areas in which you feel you could benefit from additional training, responsibility, etc.:

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**Mutual Goals:** What mutually agreed upon goals have been discussed for the next review period? Note specific programs, plans and activities to provide for the employee's development and improved performance

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I acknowledge that I have been given the opportunity to discuss the contents of this Management Performance Appraisal with the Appraiser and complete Section III. My signature does not necessarily indicate my concurrence with the review.

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**SECTION IV: APPROVALS**

I hereby certify that I have completed Sections I and II of this Review, that I have discussed this Management Performance Appraisal with the employee. I have also given the employee the opportunity to complete Section III.

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**I concur with this Performance Review.**

\*Reviewing Officer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*REVIEWING OFFICER'S SIGNATURE MUST BE OBTAINED PRIOR TO DISCUSSING WITH EMPLOYEE.**