

**PERFORMANCE APPRAISAL – MANAGEMENT – SELF APPRAISAL**



NAME \_\_\_\_\_ POSITION \_\_\_\_\_ OVERALL RATING \_\_\_\_\_  
 HIRE DATE \_\_\_\_\_ TITLE DATE \_\_\_\_\_ TODAY'S DATE \_\_\_\_\_

Instructions: Circle the appropriate rating for each factor below: 3 = Exceeds Expectations, 2 = Meets Expectations (Where expectations are numerically measurable – achieves 90-110% of expectations), 1 = Below Expectations. Assign values for responsibilities 1-5. Based on the preassigned values, the sum of the values for responsibilities 1-5 should equal .50. Each value you assign should reflect the value of that responsibility to the department or university. You may reassign values to goals with preassigned values or assign values to fewer than five goals. However the values are distributed, this total should always equal 1.0. To calculate the employee's overall rating, multiply the rating for each factor by the value of that factor to give a subtotal and add the subtotals.

| GOALS (FY ____)                                 | EXPECTATION/MEASUREMENT   | RESULT | VALUE               | RATING | SUBTOTAL |
|---|---|--------|---------------------|--------|----------|
| 1.  |   |        |                     | 3 2 1  |          |
| 2.  |   |        |                     | 3 2 1  |          |
| 3.  |   |        |                     | 3 2 1  |          |
| 4.  |   |        |                     | 3 2 1  |          |
| 5.  |   |        |                     | 3 2 1  |          |
| Time Management                                 | Managed departmental activities and resources so that annual goal accomplishment does not impede the accomplishment of essential responsibilities of the department.  |        | 0.10<br>or<br>_____ | 3 2 1  |          |
| Professional Development                        | Kept up to date on developments in his or her area of management or expertise. Maintained necessary licensure or certification.   |        | 0.10<br>or<br>_____ | 3 2 1  |          |
| Staffing  | Maintained appropriate and necessary staffing. Hired/replaced qualified personnel according to legal and university guidelines.   |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| Leadership                                      | Involved employees in enhancing department goals and motivated employees to accomplish department goals. Demonstrated support of university policies and university administration 100% of the time. Always conducted himself/herself in an appropriate and professional manner. Acted decisively and with good judgment.   |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| Communication with Staff and Management         | Ensured that individual employees clearly understood their job requirements and expectations, was available, accessible and approachable by staff. Established regularly scheduled communication/meetings with staff and management. Used good judgment in disseminating information about university & employees.  |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| Staff Development                               | Ensured departmental orientation and training of new employees within 30 days of start date. Allowed employees to take advantage of reasonable training/development opportunities. Delegates appropriately. Completed annual performance appraisals, evaluating employees in a timely, measurable and objective manner. Promptly recognized good performance and corrected poor performance/behavior. |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| Knowledge                                       | Understood university's policies, objectives and developments. Knew departmental operations in his/her area. Understood department's role as it relates to university objectives and measured department's progress towards those objectives.   |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| Equal Employment Opportunity/Affirmative Action | Demonstrated objectivity, consistency and respect in classifying, assigning work and other actions affecting employees. Recognized and valued diversity among the work group. Ensured a harassment free environment. Showed support of university's equal employment opportunity and affirmative action goals.  |        | 0.05<br>or<br>_____ | 3 2 1  |          |
| <b>Total</b>                                    | <b>COMMENTS:</b>  |        | <b>1.0</b>          |        |          |

**SIGNATURES:**

I acknowledge that I have read this appraisal and discussed it with my supervisor. I ( ) agree ( ) disagree with this appraisal. If desired, attach additional pages to explain reason for disagreement.

EMPLOYEE \_\_\_\_\_ DATE \_\_\_\_\_

REVIEWER \_\_\_\_\_ DATE \_\_\_\_\_

DEPARTMENT HEAD \_\_\_\_\_ DATE \_\_\_\_\_

**EMPLOYEE DEVELOPMENT**

This section should be completed during the performance review meeting. The answers to these questions should be the result of discussion between the reviewer and the employee. These answers should not affect the employee's performance rating.

1. Mutually agreed upon development plans for improving performance and accomplishing personal goals of employee in his/her present position. Be specific regarding education, training, or character development.
  
2. Employee's special knowledge, skills or interests which might be better utilized (particularly training or education acquired since last review), and specific ways in which they might be better utilized in employee's present position or other positions.
  
3. Employee's ideas for improving department operations.
  
4. Comments:

|  | VALUE             | EXPECTATION/MEASUREMENT |
|--|-------------------|-------------------------|
| <b>GOALS FOR NEXT FISCAL YEAR (FY _____)</b> |                   |                         |
| 1.   |                   |                         |
| 2.   |                   |                         |
| 3.   |                   |                         |
| 4.   |                   |                         |
| 5.   |                   |                         |
| <b>TOTAL</b>                                 | <b>0.50</b><br>or |                         |

The section above is a result of a discussion between my supervisor and me concerning my development.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Reviewer

\_\_\_\_\_  
Date