

# California State University, Long Beach

## MANAGEMENT PERSONNEL PERFORMANCE EVALUATION FORM

Today's Date:

Employee ID:

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Employee Name:

Working Title:

Classification:

Department:

Division:

Date of Last Evaluation:

Type of Evaluation:     six month     annual

**Division of Administration and Finance employees must utilize the skills/performance criteria numbers 1-6.**

**RATINGS:**    Use the ratings below to determine how well an employee performed in each of the performance/skills criteria listed below.

- 5    Outstanding:**                      An outstanding rating indicates that the employee consistently performs at the very highest levels. This rating, therefore, is reserved for extraordinary circumstances and should be used only when an individual's performance is within the top 5% when compared to the performance levels of all other managers and supervisors in the Division.
- 4    Exceeds expectations:**           This rating indicates that the employee performs at a level that consistently exceeds the performance of most other employees in the Division.
- 3    Meets expectations:**              This rating indicates that the employee has met all expectations of the position as well as the goals and objectives of specific assignments.
- 2    Needs improvement:**              This rating indicates that the employee's performance has not met the expectations of the position or the goals and objectives of specific assignments.
- 1    Unsatisfactory:**                    This rating indicates that the employee's performance is significantly below the expectations of the position or is seriously deficient in meeting the goals and objectives of specific assignments. For this reason, a detailed plan of action must be provided as a guideline for improving unsatisfactory performance. A special evaluation for the purpose of monitoring progress shall be completed for any employee who receives an unsatisfactory rating in one or more performance criteria. This special evaluation should be scheduled no later than six months after completion of the annual evaluation.
- N/A   Not applicable:**                This rating is provided for items which the evaluator believes does not pertain to the employee being evaluated.

### SKILLS/PERFORMANCE CRITERIA

Numbers 1 - 6 must be completed. Number 7 a - g represent other criteria as appropriate for the specific position. Number 8 allows for unique job-related skills or performance criteria not already addressed. Comments are required for each criterion that has been assigned a rating.





**OTHER JOB-RELATED PERFORMANCE CRITERIA – OPTIONAL**  
**(May be related to the position which is being reviewed)**

7. a. **RESEARCH SUPPORT** **Rating:**  
[Click here and provide a narrative for the Research Support criteria above.]
- b. **MEETING INSTRUCTIONAL NEEDS** **Rating:**  
[Click here and provide a narrative for the Meeting Instructional Needs criteria above.]
- c. **CURRICULUM DEVELOPMENT** **Rating:**  
[Click here and provide a narrative for the Curriculum Development criteria above.]
- d. **PROGRAM REVIEW & DEVELOPMENT** **Rating:**  
[Click here and provide a narrative for the Program Review & Development criteria above.]
- e. **ACADEMIC POLICY & PROCEDURE** **Rating:**  
[Click here and provide a narrative for the Academic Policy & Procedure criteria above.]
- f. **DEVELOPMENT/FUND RAISING EFFORT** **Rating:**  
[Click here and provide a narrative for the Development/Fund Raising Effort criteria above.]
- g. **GRANTS & CONTRACT DEVELOPMENT** **Rating:**  
[Click here and provide a narrative for the Grants & Contract Development criteria above.]
8. **OTHER JOB-RELATED PERFORMANCE CRITERIA** **Rating:**  
[Click here and provide a narrative for the Other Job-Related Performance criteria above.]
9. **NARRATIVE OPTION:** In place of completing skills/performance criteria 1-6 provide a narrative of employee's performance incorporating criteria 1-6 and any additional job related criteria.  
[Click here and provide a narrative.]

**Section II:**  
**GOAL SETTING AND ASSESSMENT**

1. **STATEMENT OF GOALS FROM PREVIOUS REVIEW PERIOD AND ASSESSMENT**  
Using the goal setting process established in the last review, in priority order evaluate the employee's progress and performance in meeting these agreed upon goals:  
[Click here and provide a narrative in meeting the goals from the last review period.]
2. **STATEMENT OF GOALS FOR THE NEXT REVIEW PERIOD**  
Using the goal setting process, establish in priority order, agreed upon goals to accomplish during the next fiscal year:  
[Click here and provide a statement of goals for the next review period.]

**SECTION III:  
SUMMARY RATING**

Based upon review of established goals and the performance of the skills performance criteria, measure this employee's performance based on the ratings below:

**OVERALL RATING:**

Employee Comments:

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Employee Signature

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Date

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Evaluator's Signature/Title

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Date

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Appropriate Administrator's Signature

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Date