STATE OF CALIFORNIA

MANAGERIAL PERFORMANCE APPRAISAL SUMMARY

STD. 750 (REV. 6-94)

See Instructions on reverse.

PERIOD COVERED BY THIS RATING		
FISCAL YEAR	DATE FROM	DATE TO

A. MANAGER BEING RATED

NAME, CLASS, TITLE

DIVISION, DEPARTMENT

I have reviewed the attached Manager's General Standard, the additional specific program standards (see below) and my work plan (attached). I understand that these standards and the work plan are the basis for performance appraisal of muy position for which I will be held accountable during the above rating period.

PROGRAM STANDARDS ARE

☐ ATTACHED ☐ NOT APPLICABLE

EMPLOYEE'S SIGNATURE	DATE SIGNED
SUPERVISOR'S SIGNATURE	DATE SIGNED

B. PERIODIC REVIEWS

	FIRST QUARTER					SECOND QUARTER					THIRD QUARTER					FOURTH QUARTER				
SUMMARY RATING	O	EFS	FS	MS	U	O	EFS	FS	MS	U	O	EFS	FS	MS	U	O	EFS	FS	MS	U
SUPERVISOR	INITIALS			DATE		INITIALS			DATE		INITIALS			DATE		INITIALS			DATE	
EMPLOYEE	INITIALS			DATE		INITIALS			DATE		INITIALS			DATE		INITIALS			DATE	

C. SUPERVISOR'S RECOMMENDATION

FINAL SUMMARY RATING

☐ OUTSTANDING ☐ EXCEEDS FULLY SUCCESSFUL ☐ FULLY SUCCESSFUL ☐ MINIMALLY SUCCESSFUL ☐ UNSATISFACTORY

SUPERVISOR'S SIGNATURE	DATE SIGNED	
EMPLOYEE'S SIGNATURE	DATE SIGNED	EMPLOYEE COMMENTS ATTACHED ☐ YES ☐ NO

D. HIGHER LEVEL SUPERVISORY REVIEW AND RECOMMENDATION

SUMMARY RATING

☐ OUTSTANDING ☐ EXCEEDS FULLY SUCCESSFUL ☐ FULLY SUCCESSFUL ☐ MINIMALLY SUCCESSFUL ☐ UNSATISFACTORY

COMMENTS

HIGHER LEVEL REVIEWER'S SIGNATURE	DATE SIGNED

E. APPOINTING AUTHORITY REVIEW AND RATING

☐ CONCUR WITH SUPERVISOR ☐ CHANGE TO _____

COMMENTS

	DATE SIGNED
APPOINTING AUTHORITY'S SIGNATURE	

DISTRIBUTION: Original--Department; Duplicate--Employee; Triplicate--Supervisor

INSTRUCTIONS

A. Prior to the rating period, supervisors identify the critical performance elements for the managerial positions under their control. These are compiled into work plans for each managerial employee, which are reviewed with the employee along with the Managers' General Standard and any applicable program specific performance standards.

B. During the rating period (typically the fiscal year), interim performance ratings are given at least every six months.

C. At the conclusion of the rating period, the supervisor recommends an overall rating and discusses it with the employee. The employee is given an opportunity to attach his/her own comments (including appeals) to the summary sheet.

D. The recommended rating and any employee comments are submitted to a designated higher level authority for review. Depending on the size and preference of the department, the higher level reviewer might be a division chief, the chief deputy director, or a panel of top level departmental managers. In the small departments, the appointing power may be the higher level reviewer. Larger departments might have a number of reviewers at this level (each being responsible for a particular part of the department) while smaller departments would probably have only one. In any case, the role of these reviewers would be to:

- Determine if the ratings are factually accurate, properly documented, and consistent with their own impression of how the employees' performance meets the Managers' General Standard.
- Consider all submitted ratings collectively to ensure that the managerial rating standards are being consistently applied and that the overall group of ratings effectively and accurately distinguishes the various levels of performance that are present within the rating group.
- Consider any employee comments/appeals and determine what impact, if any, they should have on the rating.

Any changes in the ratings must be supported by written comments and must be communicated back to the employee and supervisor. Employees must also be given an opportunity to submit comments/appeals on ratings that are lowered.

E. The recommendations of the higher level reviewers are submitted to the appointing power for final approval. (Where the higher level reviewer is the appointing power, steps D and E are combined.) In determining a final rating, the appointing power considers the basic factors outlined under D, although in larger departments these considerations may necessarily be very general in nature. The appointing power should also consider how the department's ratings and rating patterns will affect any bonus payments.

If the appointing power changes a rating, this should be documented and communicated back to the rater and the employee. When the rating is lowered the employee must be given an opportunity to submit comments or an appeal before the rating becomes final.