**Mid-Year Evaluation Form - Leader**

| **Date:** Click here to enter text. | [ ]  **Mid-Year Review** (annual mid-year)Note: if this is for a new employee, use the **Six-Month Review** form. |
| --- | --- |
| **Employee Name:** Click here to enter text. | **Reviewer Name:** Click here to enter text. |
| **Evaluation Area** | **Notes** |
| **Strategically Focused***Example behaviors at Meets Expectations:** Plans for both the short and long-term success of the school/division
* Aligns Emory goals with own school/division.
* Considers trends both internal and external, best practices, existing and potential needs, and current strengths of the organization.
* Creates and communicates an inspiring vision for the future.
* Develops both short and long-term strategies to achieve organizational goals.
* Demonstrates focus on strategic objectives of the University in daily behavior (e.g., ideas, decisions, etc.).

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/strategy.pdf) | **Click here to enter text.** |
| **Coaches/Develops Others***Example behaviors at Meets Expectations:** Develops the skills and abilities of others by exposing them to formal training and impactful on-the-job assignments/experiences.
* Provides ongoing, constructive feedback and coaching to help people realize their full potential.
* Utilizes University tools and processes (e.g. PM systems, development plans, LOD/HR resources) to develop team.
* Recognizes and reinforces people’s developmental efforts and improvements.
* Helps people develop plans to achieve career goals and career growth.

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/coaches.pdf) | **Click here to enter text.** |
| **Institutionally Minded***Example behaviors at Meets Expectations:** Works across boundaries for the good of the entire University, not just own team or department.
* Instills “One Emory” attitude throughout own school/division and the University as a whole.
* Actively seeks to understand the work occurring beyond own department.
* Takes steps to actively associate with people both within own work unit and across the University; leverages these connections to complete tasks.
* Is a responsible steward of institutional resources and represents Emory well in public settings.

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/institute.pdf) | **Click here to enter text.** |
| **Empowers/Delegates to Others***Example behaviors at Meets Expectations:** Allocates decision-making authority and/or task responsibility to others.
* Evaluates each employee’s ability to perform new, challenging work, and potential training needed to be successful.
* Shares information on department goals/strategies to enhance employee interest, understanding, and engagement.
* Empowers employees to take risks, supports them when things go wrong and encourage them to learn from setbacks and failures.
* Invites team to assist in making important decisions; solicits their input.

A*dditional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/empowers.pdf) | **Click here to enter text.** |
| **Leads Change***Example behaviors at Meets Expectations:** Brings about and manages change to minimize resistance, both within and outside of the organization, to meet organizational goals.
* Recognizes the needs of others, including emotional needs, and how to address their needs to help them get through the change.
* Adequately prepares for change by assembling a strong team of trusted advisors.
* Creates detailed plans for driving change that consider tasks and communication.
* Inspires and motivates others to want to change.
* Monitors implementation of change and adjusts as needed.

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/change.pdf) | **Click here to enter text.** |
| **Influences and Impacts Others***Example behaviors at Meets Expectations:** Captures people’s attention as an influential, experienced and/or knowledgeable figure.
* Is viewed as persuasive by mannerisms and communication style.
* Is influential and a sought-after resource across a variety of situations and audiences.
* Shares thinking and opinions tactfully and with confidence.
* Demonstrates awareness of personal image and style.

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/influences.pdf) | **Click here to enter text.** |
| **Strives for Operational Excellence***Example behaviors at Meets Expectations:** Displays dedication to achieving exceptional results.
* Persists to complete all tasks / responsibilities, even in the face of difficulties.
* Operates with personal ownership and looks for ways and means to improve performance.
* Displays a strong commitment to making service performance improvements and determination to achieve positive service outcomes.

*Additional examples:* [Unacceptable Meets Expectations Far Exceeds Expectations](https://www.hr.emory.edu/eu/_includes/documents/sections/performance-management/excellence.pdf) | **Click here to enter text.** |
| **Diversity, Equity and Inclusion***Example behaviors at Meets Expectations:** Shares learnings from training, readings, etc. with staff and others to foster self-awareness of biases, assumptions and attitudes, including discussions and team building exercises.
* Sets goals and expectations that others on staff pursue personal and professional development on DEI.  Includes in annual performance review.
* Facilitates dialogue in staff meetings, retreats, etc. regarding social identity and its relevance in the workplace.
* Provides training, guidance, and resources to staff that ensure diversity-related organizational policies, procedures, and/or resources (e.g., DEI office) are understood and leveraged when making relevant decisions.
* Is a sought-after resource for how to establish relationships with people from other cultures and backgrounds; seeking and using their ideas, opinions, and insights; and encouraging others to do the same.
* Sets clear expectations and best practices in recognizing and addressing incidents of explicit and implicit bias in the workplace.  Holds others accountable for a bias free workplace.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/dei-leader.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/dei-leader.pdf) | **Click here to enter text.** |
| **Overall Score** | [ ]  **Not on Track**[ ]   **On Track with Some**[ ]  **On Track with All** |
| **Additional Notes**  **Click here to enter text.** |
| **Verification of Review**By signing this form, you confirm that you have discussed your review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with the evaluation. |
| **Employee Signature:**  | **Date:** |
| **Supervisor Signature:** | **Date:** |