

## Annual Evaluation Form - Manager

<b>Date:</b>				
<b>Employee Name:</b>				
<b>1 – Unacceptable</b>	<b>2 – Needs Improvement</b>	<b>3 – Meets Expectations</b>	<b>4 – Exceeds Expectations</b>	<b>5 – Far Exceeds Expectations</b>
Inadequate performance that is consistently below job requirements and clearly problematic. <i>A review by HR is required.</i>	Generally adequate performance but needs some improvement in order to consistently meet job requirements. <i>A review by HR is required.</i>	Capable, satisfactory performance that consistently meets and occasionally exceeds job requirements.	Strong performance that consistently meets and frequently exceeds job requirements.	Superior performance that consistently exceeds job requirements. This rating should be reserved for truly outstanding performance.
<b>Evaluation Area</b>				
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<b>Evaluation Area</b>			<b>Rating</b>	
<b>Competencies: WHAT</b>				
<b>Delivering Results</b> <i>Example behaviors at Meets Expectations:</i> <ul style="list-style-type: none"> <li>Achieves excellence in all tasks and goals.</li> <li>Maintains focus and perseveres, even in the face of obstacles.</li> <li>Uses time efficiently; adapts plans when changes occur. Prioritizes tasks based on importance. Delegates appropriately.</li> <li>Actively pursues professional development and growth for self and team.</li> <li>Is receptive to and implements suggestions for improvement. Solicits feedback. Actively identifies ways to improve.</li> <li>Holds direct reports accountable for producing quality, timely results; helps others maintain focus and overcome obstacles. Provides performance feedback that facilitates development.</li> </ul> <i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a>				
<b>Problem Solving</b> <i>Example behaviors at Meets Expectations:</i> <ul style="list-style-type: none"> <li>Breaks down problems into fundamental parts. Identifies root causes and addresses problems in ways that lead to innovative solutions.</li> <li>Consistently, in all cases, makes informed decisions based on available and hard to find information. Utilizes information that is relevant, current and clear.</li> <li>Recognizes typical as well as complex and unusual issues, and actions needed to advance the decision making process. Recommends possible solutions. Follows up to ensure resolution.</li> </ul>				

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<ul style="list-style-type: none"> <li>Creates new ideas and processes despite initial ambiguity of the situation; modifies approach to achieve results in changing situations.</li> <li>Assists employees in diagnosing problems and recognizing issues. Takes time to help employees identify critical connections, consequences and alternatives. Recognizes successful adaptations.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				
<p><b>Functional Knowledge and Skills</b> <i>Example behaviors at Meets Expectations:</i></p> <ul style="list-style-type: none"> <li>Demonstrates expertise in skill and knowledge within areas relevant to one’s own function or work group.</li> <li>Develops and contributes to best practices in discipline or specialty area for the work group.</li> <li>Serves as a resource for others regarding major developments in discipline or specialty area, and facilitates sharing of methods and knowledge.</li> <li>Consistently, in all cases, seen by customers and team members as possessing high functional knowledge and skills.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				
<p><b>Service to Others/Customer Focus</b> <i>Example behaviors at Meets Expectations:</i></p> <ul style="list-style-type: none"> <li>Anticipates adverse customer reactions and develops better alternatives. Actively solicits feedback from customers to surface needs and concerns.</li> <li>Proactively keeps customers informed with both formal and informal communications. Follows up with customers to ensure satisfaction.</li> <li>Fulfills service commitments prior to deadlines. Willingly puts in extra time and effort in crisis situations; goes the “extra mile” to ensure customer needs are met.</li> </ul>				

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<ul style="list-style-type: none"> <li>Actively seeks new opportunities to build relationships and understand the needs of customers.</li> <li>Provides same high level of customer service to staff as to internal and external customers. Delivers on promises to employees.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				
<b>Competencies: HOW</b>				
<b>Building Trust</b> <i>Example behaviors at Meets Expectations:</i> <ul style="list-style-type: none"> <li>Behaves and expresses oneself in an open and honest manner; is consistent in all cases with what he/she says and does; appropriately handles difficult situations.</li> <li>Consistently, in all cases, shares information that is accurate and complete; handles sensitive information appropriately.</li> <li>Follows through on all assignments and commitments, completing them in a timely and reliable manner; consistently, in all cases, makes others aware of task/assignment status.</li> <li>Demonstrates commitment to Emory's goals, initiatives, policies and procedures through communication and actions.</li> <li>Encourages employees to be open and honest; holds employees accountable for sharing accurate and complete information; recognizes employees who follow through and demonstrate commitment.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				
<b>Collaboration</b> <i>Example behaviors at Meets Expectations:</i> <ul style="list-style-type: none"> <li>Consistently, in all cases, treats everyone, with dignity, respect and fairness; is very easy to approach and helpful.</li> </ul>				

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<ul style="list-style-type: none"> <li>Resolves interpersonal conflicts constructively and professionally; seldom requires outside assistance.</li> <li>Enthusiastically spends time with others to help them and the team succeed.</li> <li>Promotes awareness and respect of cultural and individual values and differences; leverages the strengths of others to accomplish goals, regardless of background.</li> <li>Listens to and carefully considers ideas from others, even when different from own; ensures all sides are heard before reaching a conclusion.</li> <li>Encourages teamwork among direct reports; facilitates resolution of team conflicts; promotes respect among all team members.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				
<p><b>Communication</b></p> <p><i>Example behaviors at Meets Expectations:</i></p> <ul style="list-style-type: none"> <li>Provides regular, consistent, and meaningful information to others; ensures appropriate individuals are informed.</li> <li>Listens carefully to others, asks questions for clarification, and ensures message is understood.</li> <li>Communicates in a clear and concise manner using appropriate grammar, pronunciation and tone; conveys message using appropriate method of communication (email, phone, in person).</li> <li>Demonstrates an ability to influence others by modeling appropriate body language and nonverbal communication.</li> <li>Tailors communication style to the needs of each situation and audience.</li> <li>Encourages direct reports to communicate consistently, clearly and professionally.</li> </ul> <p><i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a></p>				

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<b>Taking Initiative</b> <i>Example behaviors at Meets Expectations:</i> <ul style="list-style-type: none"> <li>Actively seeks out ways on own to improve outcomes, processes or measurements.</li> <li>Takes responsibility and provides leadership on projects or initiatives.</li> <li>Takes action on projects without being directed to do so, and looks for opportunities to move projects along.</li> <li>Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.</li> <li>Encourages staff to identify and address process improvements, participate in projects and on committees when appropriate.</li> </ul> <i>Additional examples:</i> <a href="#">Unacceptable</a> <a href="#">Far Exceeds Expectations</a>					

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<p><b>Overall Score</b></p> <ol style="list-style-type: none"> <li><b>Unacceptable:</b> The employee frequently performs below the level expected of this position in all or almost all key aspects of the position. Both what is produced and how it is produced are below Emory standards and clearly unacceptable. Unless there is obvious and immediate improvement, earning this rating should cause Emory and the employee to seriously consider whether continued employment is appropriate. <i>A performance improvement plan and review by HR is required.</i></li> <li><b>Needs improvement:</b> The employee demonstrates adequate performance in most areas, but needs improvement in one or more significant aspects that are critical to the position. Either what is produced or how it is produced require improvement in one or more areas to meet expectations of the position and Emory. Such performance shortfalls may be attributable to newness on the job, missing or undeveloped skills, and/or experience. Regardless, this rating conveys that performance is below expectations in one or more areas and must be improved. <i>A performance improvement plan and review by HR is required.</i></li> <li><b>Meets expectations:</b> The employee consistently demonstrates capable, or satisfactory, performance. Both what is produced and how it is produced meet Emory standards and expectations of the position. The employee is a dependable, competent, knowledgeable individual who meets and occasionally exceeds expectations of the position. This rating conveys solid, effective performance.</li> <li><b>Exceeds expectations:</b> The employee demonstrates strong, consistent performance in all or almost all competencies, skills and responsibilities. Both what is produced and how it is produced meet and often exceed Emory</li> </ol>				

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<p>standards and expectations of the position. Results add value beyond the scope of the current role, often benefiting the division/department. Examples of these results must be given to receive this rating. This rating should be reserved for employees with strong, commendable performance.</p> <p>5. <b>Far exceeds expectations:</b> The employee regularly demonstrates superior performance. Both what is produced and how it is produced far exceed Emory standards and expectations of the position. The employee is extraordinarily competent and productive. Performance at this level occurs throughout the year and across all key aspects of the position. This employee is often sought out by others for counsel and assistance, and is widely recognized as a role model. Examples of the results and sought after expertise must be given to receive this rating. This rating should be used sparingly and reserved for truly outstanding performance throughout the review period.</p>				

<b>Verification of Review</b>	
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.	
<b>Employee Signature:</b>	<b>Date:</b>
<b>Supervisor Signature:</b>	<b>Date:</b>