**Annual Evaluation Form - Leader**

| **Date:** Click here to enter text. | | | | | | | |
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| **Employee Name:** Click here to enter text. | | | | **Reviewer Name:** Click here to enter text. | | | |
| **1 – Unacceptable** | **2 – Needs Improvement** | **3 – Meets Expectations** | | | **4 – Exceeds Expectations** | **5 – Far Exceeds Expectations** | |
| Inadequate performance that is consistently below job requirements and clearly problematic. *A review by HR is required.* | Generally adequate performance but needs some improvement in order to consistently meet job requirements. *A review by HR is required.* | 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. | |
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| **Evaluation Area** | | | **Notes** | | | | **Rating** |
| **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.** | | | | **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.** | | | | **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.** | | | | **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.   *Additional 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.** | | | | **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.** | | | | **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.** | | | | **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.** | | | | **Click here to enter text.** |
| **Diversity, Equity and Inclusion**  *Example behaviors at Meets Expectations:*   * Pursues knowledge and displays a self-awareness of diversity, equity and inclusion * Adopts or modifies operational practices to help ensure DEI * Actively addresses or makes known issues of inequity and bias whenever possible.   *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.** | | | | **Click here to enter text.** |
| **Overall Score**   1. **Unacceptable**: 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. *A performance improvement plan and review by HR is required.* 2. **Needs improvement**: 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.  *A performance improvement plan and review by HR is required.* 3. **Meets expectations**: 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. 4. **Exceeds expectations**: 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 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. 5. **Far exceeds expectations**: 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. | | | **Click here to enter text.** | | | | **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. | |
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| **Employee Signature:** | **Date:** |
| **Supervisor Signature:** | **Date:** |