**Mid-Year Evaluation Form - Manager**

| **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** |
| **Competencies: WHAT** |
| **Delivering Results***Example behaviors at Meets Expectations:** Achieves excellence in all tasks and goals.
* Maintains focus and perseveres, even in the face of obstacles.
* Uses time efficiently; adapts plans when changes occur. Prioritizes tasks based on importance. Delegates appropriately.
* Holds direct reports accountable for producing quality, timely results; helps others maintain focus and overcome obstacles..
* 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.
* Demonstrates commitment to Emory’s goals, initiatives, policies and procedures through communication and actions.
* Recognizes employees who follow through and demonstrate commitment.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/delivering-results-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/delivering-results-manager.pdf) | **Click here to enter text.** |
| **Problem Solving***Example behaviors at Meets Expectations:** Breaks down problems into fundamental parts. Identifies root causes and addresses problems in ways that lead to innovative solutions.
* Consistently, in all cases, makes informed decisions based on available and hard to find information. Utilizes information that is relevant, current and clear.
* 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.
* Creates new ideas and processes despite initial ambiguity of the situation; modifies approach to achieve results in changing situations.
* Assists employees in diagnosing problems and recognizing issues. Takes time to help employees identify critical connections, consequences and alternatives. Recognizes successful adaptations.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/problem-solving-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/problem-solving-manager.pdf) | **Click here to enter text.** |
| **Functional Knowledge and Skills***Example behaviors at Meets Expectations:** Demonstrates expertise in skill and knowledge within areas relevant to one’s own function or work group.
* Develops and contributes to best practices in discipline or specialty area for the work group.
* Serves as a resource for others regarding major developments in discipline or specialty area, and facilitates sharing of methods and knowledge.
* Consistently, in all cases, seen by customers and team members as possessing high functional knowledge and skills.
* Actively pursues professional development and growth for self and team.
* Provides performance feedback that facilitates development

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/functional-knowledge-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/functional-knowledge-manager.pdf) | **Click here to enter text.** |
| **Service to Others/Customer Focus***Example behaviors at Meets Expectations:** Anticipates adverse customer reactions and develops better alternatives. Actively solicits feedback from customers to surface needs and concerns.
* Proactively keeps customers informed with both formal and informal communications. Follows up with customers to ensure satisfaction.
* 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.
* Actively seeks new opportunities to build relationships and understand the needs of customers.
* Provides same high level of customer service to staff as to internal and external customers. Delivers on promises to employees.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/service-to-others-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/service-to-others-manager.pdf) | **Click here to enter text.** |
| **Competencies: HOW** |
| **Diversity, Equity, and Inclusion***Example behaviors at Meets Expectations:** Actively pursues opportunities (e.g., readings, forums, special interest groups, etc..) that foster greater self-awareness and reflection on one’s biases, assumptions and attitudes
* Encourages others to pursue or join in pursuing personal and professional development (e.g., LOD classes, e-learning, books) on issues related to diversity, equity, and inclusion.
* Shares insights and visible support (through words, actions, etc.) regarding the role of social identity (e.g., race, gender, disability status, religion, etc..) and its relevance in the workplace.
* Shares personal examples and best practices in the use diversity-related organizational policies, procedures, and/or resources (e.g., DEI office) to help resolve issues and make decisions.
* Proactively and enthusiastically establishes relationships with people from other cultures and backgrounds; seeks and uses their ideas, opinions, and insights.
* Provides leadership and guidance on the importance of recognizing and addressing incidents of explicit and implicit bias in the workplace.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/dei-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/dei-manager.pdf) | **Click here to enter text.** |
| **Collaboration***Example behaviors at Meets Expectations:** Consistently, in all cases, treats everyone, with dignity, respect and fairness; is very easy to approach and helpful.
* Resolves interpersonal conflicts constructively and professionally; seldom requires outside assistance.
* Enthusiastically spends time with others to help them and the team succeed.
* Is receptive to and implements suggestions for improvement. Solicits feedback. Actively identifies ways to improve.
* 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.
* Consistently, in all cases, shares information that is accurate and complete; handles sensitive information appropriately.
* Encourages employees to be open and honest; holds employees accountable for sharing accurate and complete information.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/collaboration-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/collaboration-manager.pdf) | **Click here to enter text.** |
| **Communication***Example behaviors at Meets Expectations:** Provides regular, consistent, and meaningful information to others; ensures appropriate individuals are informed.
* Listens carefully to others, asks questions for clarification, and ensures message is understood.
* Communicates in a clear and concise manner using appropriate grammar, pronunciation and tone; conveys message using appropriate method of communication (email, phone, in person).
* Demonstrates an ability to influence others by modeling appropriate body language and nonverbal communication.
* Tailors communication style to the needs of each situation and audience.
* Encourages direct reports to communicate consistently, clearly and professionally.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/communication-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/communication-manager.pdf) | **Click here to enter text.** |
| **Taking Initiative***Example behaviors at Meets Expectations:** Actively seeks out ways on own to improve outcomes, processes or measurements.
* Takes responsibility and provides leadership on projects or initiatives.
* Takes action on projects without being directed to do so, and looks for opportunities to move projects along.
* Enthusiastically seeks and accepts additional responsibilities, both in the context of the job and outside immediate job responsibilities.
* Encourages staff to identify and address process improvements, participate in projects and on committees when appropriate.

*Additional examples:* [Unacceptable](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/taking-initiative-manager.pdf) [Far Exceeds Expectations](https://hr.emory.edu/eu/_includes/documents/sections/performance-management/taking-initiative-manager.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:** |