**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:** | |