

PERFORMANCE EVALUATION- MANAGER EVALUATION QUESTIONS

A best practice in preparing to complete your manager evaluation:

Please review the employee's job description to ensure your evaluation comments reflect the employee's work responsibilities and work expectations for performance. As you complete the manager evaluation, also consider goals that may have been established for the employee's review period.

Overall Evaluation Section (Required)

Your Manager Evaluation for the review period should evaluate and discuss the employee's overall job performance and include, if applicable:

- **Progress Toward Goals and Accomplishments:** Base your evaluation on the position requirements, achievement of the goals established for the review period, and your assessment of the employee's accomplishments.
- **Improvement & Growth Areas:** If applicable, also provide specific examples of performance needing more attention and/or improvement. Give specific examples to clearly support your assessment.
- **Future Expectations and Goals:** State and discuss the expectations and goals for the upcoming review period.

Rating Rubric

Exceptional:

Performance consistently exceeds expectations and delivers exceptional results in performance against goals and core functions. Demonstrates innovation and initiative in all aspects of the position. Work is widely recognized and positively and significantly impacts department/University operations. Sets a new standard.

Highly Effective:

Performance frequently exceeds expectations and job requirements. Performance at a level beyond expectations is sustained, and the quality of work is uniformly high.

Effective:

Consistently meets requirements of the position in terms of quality and quantity. At times employee may exceed expectations. Overall, employee makes solid, reliable and meaningful contributions to the department with on-time results.

Requires Improvement:

Demonstrates satisfactory performance in some areas; however, does not perform or meet expectations consistently. Employee needs to acquire and/or develop necessary skills and build/sustain acceptable standard of performance.

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Competency Section Opt-In (Required)

Instructions: You must answer the question below. Completion of the Competency evaluation is optional unless required by your Department. Please indicate if you will be completing the Competency evaluation by selecting Yes or No.

Question: Will you be using the competency sections below to assess the employee?

Answer Options: Yes or No

Employee Competencies Section

The completion of the Competency evaluation is optional unless required by your Department.

If you selected **Yes** above, you are required to:

- Provide a rating for **each** core competency, and
- Include a brief, factual comment supporting each rating in the "Answer" field. Comments should be objective, work-related, and based on observed performance and outcomes during the review period.

If you selected **No** above, no further action is required in this section.

Important: If you selected "**Yes**" and do not provide both a rating and a corresponding answer/comment for every core competency, you will receive an error message and will not be able to submit the form until both the rating and corresponding answer/comment for every core competency is completed.

Employee Competencies:

1. **Customer Focus:** Consistently exhibits professional demeanor with internal and external constituents and peers through verbal and written customer focused communication. This includes listening, understanding customer expectations/perspective and acknowledging and responding to concerns in a timely and helpful manner. Demonstrates commitment to exceptional service, timely problem resolution.
2. **Job Knowledge:** Possesses and continually updates requisite knowledge and understanding of assigned duties, responsibilities, policies, procedures and compliance requirements to perform the position. Demonstrates technical skills required for the position. Understands business needs and desired outcomes.

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3. **Work Product**: Demonstrates quality product including accuracy and thoroughness in work required for the position. Plans and completes acceptable quantity of work within deadlines. Works with diligence and identifies opportunities to streamline or improve processes.
4. **Dependability/ Accountability/ Professionalism**: Follows through on assignments. Takes ownership of work. Is reliable, professional and responsible. Adheres to procedures, practices, and work schedule. Work is completed in a timely manner and within established deadlines effectively using resources. Demonstrates commitment to professional development.
5. **Collaboration/Teamwork**: Demonstrates cooperation and teamwork. Values and seeks input and expertise of others. Contributes to the team environment by working effectively with others on the team to accomplish work. Treats co-workers with respect, honesty and fairness. Resolves issues effectively and is viewed as a positive team member and/or colleague.
6. **Communication**: Communicates effectively and respectfully verbally and in writing. Follows instructions and shares information appropriately. Engages in meaningful two-way conversations. Listens attentively and clarifies information when necessary.

Managerial Competencies Section

The Managerial Competencies section should be completed only if you have elected to complete the Competency evaluation above. If you chose not to complete the Competency evaluation, no further action is required here.

If completing the Competency evaluation, you must:

Provide a rating for each managerial competency, and include a brief, factual comment supporting each rating in the "Answer" field. Comments should be objective, work-related, and based on observed performance and outcomes during the review period.

If the employee you supervise is not a manager, select the "N/A" rating for each managerial competency and enter "N/A" in the corresponding answer/comment field.

Important: If you elect to complete the Competency evaluation, you must provide both a rating and a corresponding answer/comment for both managerial competencies. If any rating or comment is missing, you will receive an error message and will not be able to submit the form until both the rating and corresponding answer/comment for every core competency is completed.

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Managerial Competencies:

1. **Management:** Establishes performance expectations for staff. Provides timely, effective and meaningful feedback that motivates staff members to improve their performance. Builds and supports a high performing team. Assists employees in eliminating barriers to performance and provides encouragement for skill development. Delegates responsibility appropriately. Recognizes and rewards achievement.
2. **Leadership:** Establishes clear vision for staff and motivates employees to achieve their best performance. Engages and motivates staff, coaching for peak performance. Promotes a welcoming, inclusive and supportive work environment and fosters continuous improvement. Makes outreach efforts and uses resources to create a diverse workforce. Leads and manages change. Builds and manages relationships across the department and University.

Supporting Documentation (Optional)

Upload of supporting documents is optional. This section may be used to provide objective, work-related materials that support your evaluation of the employee's performance during the review period.

If you choose to upload documentation, submit one consolidated file with any materials you feel are relevant to the employee's review.

Performance documents must be factual, professional, and directly related to the review period. Do not upload personal commentary, speculative opinions, unrelated materials, or confidential information about the employee or others. Only include documentation appropriate for a formal performance record and consistent with University policy.

Examples of appropriate documents include: performance metrics or reports, project deliverables or summaries, goal outcomes and formal feedback or recognition.

Important: Only one document file may be uploaded. Submitting more than one file will result in an error message. Please combine all materials into a single file before uploading.