

MANAGERIAL EVALUATION OVERVIEW GUIDE

EVALUATION COMPONENTS

SECTION ONE: *COMPETENCIES & PERFORMANCE STANDARDS*

RATING	DESCRIPTION
Student-Focused Mindset	Employee demonstrates a relentless focus on students; makes decisions with students in mind. If applicable, employee is sensitive and responsive to the current and future needs of the student.
People Leadership for Supervisors	Employee sets realistic expectations for staff. Provides timely, effective and meaningful feedback in order to motivate staff to improve performance. Appropriately delegates work and holds team members accountable. Employee has demonstrated the ability to build and support a high performing team.
Communication	Employee effectively gets their point across to others. Directives and instructions are clear and thorough. Written communications are accurate and crafted with the audience in mind. Employee listens attentively and clarifies information when necessary.
Collaboration	Employee has the ability to work together with others to achieve a common business purpose. Employee is dependable, keeps commitments and positively contributes to the goal. Key messages are communicated in an effective and timely fashion.
Job Knowledge	Employee possesses requisite knowledge and understanding of assigned duties, responsibilities, policies, procedures and compliance requirements of the position. Employee understands business needs and desired outcomes.

SECTION TWO: *OUTCOMES & EXECUTION*

RATING	DESCRIPTION
Goal Setting & Achievement	Employee commits to challenging, yet realistic goals. Employee aggressively pursues goals. Employee sets realistic deadlines and meets them and produces high quality work, which is accurate and thorough. Employee completes an acceptable quantity of work within established deadlines.
Problem Solving & Agility	Employee has demonstrated the ability to consider solutions to problems. Employee develops sustainable solutions and executes. Employee thinks proactively and is open to change.
Management of Resources	Employee maximizes the use of resources. Employee uses finances, facilities, equipment, materials and team members effectively in a way that supports the overall goals of the University.
Follow Up & Control	Employee is self-motivated and proactive in the execution of their duties. Subordinates are provided with thorough and effective direction as well as the authority to complete tasks assigned to them.
Innovations in Productivity & Fiscal Management	Employee works with diligence and identifies opportunities to streamline or improve processes.

RATING SCALE

RATING	DESCRIPTION
EXCEEDS EXPECTATIONS	Results exceeded expectations for the position. Employee consistently performed at a superior level. Employee may have completed a major goal or made an exceptional or unique contribution to the unit/department/University.
MEETS EXPECTATIONS	Fulfills position requirements. Consistently achieves established goals and meets expectations. Performance results in contributions to department and University goals.
DOES NOTCONSISTENTLY MEET EXPECTATIONS	Does not consistently achieve desired results or significant position requirements. Requires improvements in areas noted. A Performance Improvement Plan* (PIP) must be implemented.
UNSATISFACTORY	Fails to achieve desired results and does not fulfill position requirements. Performance Improvement Plan* (PIP) must be developed and monitored.

*Note that Performance Improvement Plans (PIPs) will not be implemented in the system. Supervisors should develop PIPs using the existing PIP template and forward signed copies to the Office of Human Resources to be kept on file.

OVERVIEW OF MANAGERIAL EVALUATION BUSINESS PROCESS:



KEY EVALUATION STEPS

1. Self-Evaluation by Managerial Employee

The manager being evaluated will complete a self-evaluation, rating their performance in each of the categories in Sections One and Two above. The self-evaluation is intended for the employee's self-reflection and accountability and will be reviewed by their immediate supervisor as well as the approval chain as they proceed through the evaluation process.

2. Managerial Evaluation by Immediate Managerial Supervisor

Once the self-evaluation has been completed, the evaluation will route to the immediate supervisor. The supervisor will input ratings on each category, choosing the rating that most objectively reflects their performance in the category over the prior period. The manager should include comments in the Summary section, specifically including comments to support ratings other than Meets Expectations. Once the supervisor has entered all required ratings and accompanying comments, they will submit the evaluation to move it forward for review and approval by next-level management, if applicable.

3. Review and Approval by Approval Chain

After the manager completes their evaluation, it will route through an approval chain in most cases. Each evaluation's approval flow will depend upon the managers' placement within the University's organizational chart. Generally, approvals will be required from each employee's Vice President and Senior Vice President. Senior management will have an opportunity to review ratings and discuss internally if necessary. Once all approvals have been applied within the system, the evaluation will route back to the immediate supervisor for delivery and acknowledgement.

4. Evaluation Delivery

The approved evaluation will route back to the immediate supervisor for delivery to the employee. Supervisors are encouraged to meet with their managerial direct reports to discuss the evaluation and, following this discussion, the supervisor will complete an acknowledgement in the system to move the evaluation forward to the employee.

5. Employee Acknowledgment

After discussing the evaluation with their supervisor, the employee will receive a copy in their Workday inbox. The employee will complete an acknowledgment of receipt, including comments if they choose to do so. Once this acknowledgement has been submitted, the evaluation process will be complete.

IMPORTANT NOTES AND RESOURCES

- Please refer to the Managerial Evaluation Calendar located on the [Performance Management webpage](#) for all deadlines and other important dates.
- Please visit the [Kean|Workday webpage](#) for instructional guides to assist with the completion of the evaluation in the system. The following guides are available:
 - Guide for Managerial Employees (covers self-evaluation and employee acknowledgement)
 - Guide for Immediate Managerial Supervisors and Next-Level Management (covers manager evaluation, approval chain, and evaluation delivery)

QUESTIONS OR CONCERNS?

For questions about the Managerial Evaluation process, please contact Meaghan Lenahan at lenahanm@kean.edu.

For general questions about Workday, please email us at workday@kean.edu.