# 2012-2013 Executive Performance Evaluation:
# Form Instructions

## SYSTEM REQUIREMENTS:

The 2012-2013 Executive Performance Evaluation form requires users to use the latest version of Adobe Reader. Follow the link to update your program now if you have not already done so, http://www.adobe.com/products/reader.html. This takes roughly 60-90 seconds.

To check system requirements, open the 2012-2013 Executive Evaluation form and see the menu bar at the top of the page. Click "Help." You are looking for "Adobe Reader X" or above. If find that your Adobe Reader program needs updating, close the form first and follow the link, http://www.adobe.com/products/reader.html.

The Executive Performance Evaluation form works best with computers that are compatible with Windows software (note: all work computers are compatible with Windows software). Mac OS software users may experience challenges in completing the interactive form using Adobe Reader. If you experience trouble while using Mac OS software, try updating the Adobe Program for Mac OS at, http://helpx.adobe.com/acrobat/kb/install-reader-x-mac-os.html. If you still experience challenges, you will need to use a computer that is compatible with Windows software.

## HELPFUL TROUBLESHOOTING TIPS:

Email Trouble – If you are unable to connect to your e-mail using the routing buttons, there's a good chance your Adobe Reader needs to be updated to version XI, http://www.adobe.com/products/reader.html.

Trouble saving your work - If you receive an error message when attempting to save your work, there's a good chance your Adobe Reader needs to be updated to version XI, http://www.adobe.com/products/reader.html.

No Electronic Signature – The form requires several users to sign the form electronically. Once you click on the signature button, follow the steps using the "signature wizard" to create a new digital ID.

Mac OS Challenges - The Executive Performance Evaluation form works best with computers that are compatible with Windows software (note: all work computers are compatible with Windows software). Mac OS software users may experience challenges in completing the interactive form using Adobe Reader. If you experience trouble while using Mac OS software, try updating the Adobe Program for Mac OS at, http://helpx.adobe.com/acrobat/kb/install-reader-x-mac-os.html. If you still experience challenges, you will need to use a computer that is compatible with Windows software.

## QUESTIONS:

For questions regarding this form's content, please contact Traycee Brinson of Human Resources at (706) 721-5766 or by e-mail at TRBRINSON@gru.edu.

For questions regarding technical challenges, please contact Cynthia Crowder of Human Resources at (706) 721-7358 or by e-mail at ccrowder@gru.edu.

## COMPLETING THE FORM

**Page 1**

Leaders being evaluated should enter professional information such as their name, department home, key / key relationship scores, evaluation period, etc…

| COMPLETED BY LEADER BEING EVALUATED |

If applicable, Leaders being evaluated should enter "distribution of effort" percentages for FY12 - FY13 on the same page. You will need to enter average values from report provided; scores are based on a 4-point scale.

Located at the bottom of this page is the performance evaluation scale to be used in evaluating performance.

| | |
|---|---|
| **Pages 2-6, Section 1A** | Leaders being evaluated should complete a self-evaluation for each goal category (evaluation level found on page 2). Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |
| **COMPLETED BY LEADER BEING EVALUATED** | Users that serve as the evaluated leaders should use this area to enter the evaluation level for each goal category and any applicable comments. |
| **COMPLETED BY MANAGER** | The evaluated leader's manager/supervisor will also be able to enter his/her evaluation level for each goal listed and may edit comments accordingly before the evaluation is finalized with signatures.

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |
| **Page 7, Section 1B** | This section is to be completed by Administrative Faculty with rank. Use this area to describe 2012-2013 accomplishments for each area/activity listed. Provide a narrative summary of specific accomplishments, including special recognition by students and peers, academic promotion, board certification, etc. |
| **COMPLETED BY LEADER BEING EVALUATED (ONLY ADMINISTRATIVE FACULTY WITH RANK)** | Administrative Faculty with rank should use the "other" section if there is a need to provide additional information applicable to the aforementioned areas/activity sections.

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |
| **Page 8, Section 1C** | Leaders being evaluated should list their individual goals /objectives/metrics from the prior year's evaluation (you may copy and paste from your prior year's evaluation into this area). |
| **COMPLETED BY LEADER BEING EVALUATED** | In this section, leaders being evaluated should enter the performance level achieved – did not meet (if the goal was not met at the threshold level, threshold, target, or high performance.

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |
| **COMPLETED BY MANAGER** | The evaluated leader's manager/supervisor should review this section and may edit comments accordingly before the evaluation is finalized with signatures |
| **COMPLETED BY LEADER BEING EVALUATED** | Leaders being evaluated will then be able to route the form to their manager/supervisor. To route the form, simply scroll to the bottom of page 8, find the grey "button" and click on the button. Following this action, an email will open with the form already attached (users should use a computer that connects to either a web or Outlook email account).

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation* prior to routing the form to your manager. |
| **Page 9, Section 2A** | Managers should use this section to enter his/her input regarding the leader's overall performance through the narrative section entitled overall evaluation (discuss areas of strength and improvement). The manger should include the feedback from any center, institute or service line, when applicable. |
| **COMPLETED BY MANAGER** | Managers should provide an overall performance evaluation rating using the performance evaluation scale (found on pg. 2).

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |
| **Page 9, Section 2B** | In this section, mangers should enter the evaluated leader's goals/objectives/metrics for the coming year. |
| **COMPLETED BY MANAGER** | Managers should include measurements for each performance level – threshold, target, and high performance.

Save the form using the format, *[NAME] 2012-2013 Executive Performance Evaluation.* |

| | |
|---|---|
| **Page 10, Section 2C**<br><br>COMPLETED BY MANAGER | If applicable, the immediate supervisor should provide a "Faculty Development Plan" to identify actions the evaluated leader can take to grow in the coming year.<br><br>If the leader being evaluated is also a faculty member with rank, refer to GRU promotion and tenure guidelines and design plan. |
| **Page 10, Section 2D**<br><br>COMPLETED BY MANAGER | If applicable, the immediate supervisor should provide an "Improvement Plan" to identify actions the evaluated leader can take to improve in the coming year.<br><br>Managers should provide areas for improvement as well as action steps the leader being evaluated should take to improve performance in the coming year.<br><br>*Save the form using the format, [NAME] 2012-2013 Executive Performance Evaluation.* |
| COMPLETED BY LEADER BEING EVALUATED | Once the immediate supervisor has completed his/her input, the form should be printed and the evaluation meeting conducted. At the conclusion of the evaluation meeting, the evaluation should be signed by both the leader being evaluated and the manager. |
| **Page 11, Section 3A**<br><br>COMPLETED BY LEADER BEING EVALUATED | Leaders being evaluated will have an opportunity to make comments directly on the form in response to the supervisor's evaluation.<br><br>**Please note: Once the supervisor has completed the entry into the form, no further editing will be possible.** |
| COMPLETED BY MANAGER | Final forms (with all signatures) should be submitted to Human Resources, FG-2227 or by e-mail, TRBRINSON@gru.edu. |

## QUESTIONS:

For questions regarding this form's content, please contact Traycee Brinson of Human Resources at (706) 721-5766 or by e-mail at TRBRINSON@gru.edu.

For questions regarding technical challenges, please contact Cynthia Crowder of Human Resources at (706) 721-7358 or by e-mail at ccrowder@gru.edu.