

## **Factors to be considered in the Evaluation of managers**

Adopted by the Board of Governors

February 9, 2004

### Professionalism

Trustworthiness; integrity; dedication; courtesy; cooperative attitude; exemplary behaviour (i.e. to colleagues, subordinates and students); loyalty to College values and mission; reliability; expertise; perseverance (is not a quitter); discretion; respect for others.

### Leadership and initiative

Is a self-starter; has a bias toward action; acts autonomously and assumes responsibility for dossiers within general mandate; approaches problems in a flexible and open-minded way; cooperates with colleagues to achieve stated College goals; adapts to rapidly changing circumstances; motivates others to accept change; influences others and motivates them to collaborate in the achievement of objectives; supports the objectives of the supervisor.

### Planning and organization

Anticipates future developments; sets priorities; establishes valid and realistic objectives defines approaches for attaining those objectives.

### Decision-making and control

Exercises good judgment; addresses problems objectively and effectively; makes sound, logical decisions (even under stress); takes appropriate action in order to attain objectives.

### Administration

Develops and implements appropriate processes and procedures; ensures execution of plans; allocates available resources in an effective and efficient manner; uses available staffing resources in an effective manner; understands College policies and procedures, and is consistent in their application.

### Delegation

Assigns responsibilities to staff; motivates staff to perform effectively; supervises productivity; develops personnel.

### Communications and human relations

Prepares written reports and documentation which achieve their purposes; presents ideas clearly and convincingly; expresses him/herself effectively to individuals and in groups; hears others, respects their input; maintains effective working relationships; clarifies support expected from supervisor; advises supervisor when support is adequate or inadequate.

### Self-development/Career planning

Identifies weaknesses in own managerial skills and style; seeks advice of others, as appropriate; seeks support, as needed; is open and willing to learn; seeks actively to improve skills; seeks new challenges and opportunities for development.

**Job Description**

Job description of an individual manager to be attached under this schedule

## BASE PROTOCOL

Name of Manager: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

Name of Supervisor's  
Immediate Superior: \_\_\_\_\_

Department or Service: \_\_\_\_\_

### I. DISTRIBUTION OF CONFIDENTIAL QUESTIONNAIRES

As appropriate, Confidential Questionnaires will be distributed to the following individuals.

NOTE: Include list of individuals who will  
receive Confidential Questionnaires

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

### II. SELF-ASSESSMENT

Manager's self-assessment will be submitted to supervisor by \_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Manager                      Signature of Supervisor                      Date

### CONFIDENTIAL QUESTIONNAIRE

\_\_\_\_\_ is being evaluated as part of the "Management Evaluation Process". I therefore request your opinion on how he/she has performed in the position of \_\_\_\_\_ . In formulating your response, you may wish to comment on the following factors (see descriptions on schedule 1):

- Professionalism
- Leadership and Initiative
- Planning and Organization
- Decision-Making and Control
- Administration
- Delegation
- Communications and Human Relations
- Self-development/Career Planning
- Other areas or aspects you wish to address

*Please substantiate your comments with specific examples.*

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*Please provide your opinion of the manager's performance in carrying out the following objective(s).*

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Your name: \_\_\_\_\_

Please return your comments to me in the envelope provided.

Signed \_\_\_\_\_

Date \_\_\_\_\_

# SUMMARY OF EVALUATION

<b>QUALITY OF MANAGEMENT</b>	Unsatisfactory <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Good <input type="checkbox"/>	Very Good <input type="checkbox"/>	Excellent <input type="checkbox"/>
<b>ATTAINMENT OF OBJECTIVES</b>	Unsatisfactory <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Good <input type="checkbox"/>	Very Good <input type="checkbox"/>	Excellent <input type="checkbox"/>

<b>OVERALL EVALUATION</b>	Unsatisfactory <input type="checkbox"/>	Satisfactory <input type="checkbox"/>	Good <input type="checkbox"/>	Very Good <input type="checkbox"/>	Excellent <input type="checkbox"/>
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**COMMENTS OF SUPERVISOR:**

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Number of respondents to the Confidential Questionnaire \_\_\_\_\_

**COMMENTS OF MANAGER:**

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Job description is appropriate  or requires modification

\_\_\_\_\_  
Signature of Manager

\_\_\_\_\_  
Signature of Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Director General

\_\_\_\_\_  
Date

# SUPERVISOR'S EVALUATION FORM

Name of Manager: \_\_\_\_\_

Name of Supervisor: \_\_\_\_\_

Date: \_\_\_\_\_

## 1.0 QUALITIES OF MANAGEMENT

The supervisor shall focus on the quality of the manager's performance in carrying out the responsibilities of his/her position. In the evaluation, the supervisor shall take into account special accomplishments of the manager, particular problems or circumstances which may have had an impact on the manager's performance, and the results of the questionnaires, where pertinent.

### Professionalism

e.g. Trustworthiness; reliability; integrity; expertise; dedication; perseverance (i.e. not a quitter); loyalty to College values and mission; courtesy; discretion; cooperative attitude; respect for others; exemplary behaviour (i.e. to colleagues, subordinates and students).

Supervisor's Comments:

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### Leadership and Initiative

e.g. Is a self-starter, has a bias toward action; Acts autonomously and assumes responsibility for dossiers within general mandate; approaches problems in a flexible and open-minded way; cooperates with colleagues to achieve stated College goals; adapts to rapidly-changing circumstances; motivates others to accept change; influences others and motivates them to collaborate in the achievement of objectives; supports the objectives of the supervisor.

Supervisor's Comments:

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## Planning and Organization

e.g. Anticipates future developments; sets priorities; establishes valid and realistic objectives; defines approaches for attaining those objectives.

Supervisor's Comments:

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## Decision-Making and Control

e.g. Exercises good judgment; addresses problems objectively and effectively; makes sound, logical decisions (even under stress); takes appropriate action in order to attain objectives.

Supervisor's Comments:

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## Administration

e.g. Develops and implements appropriate processes and procedures: ensures execution of plans; allocates available resources in an effective and efficient manner; uses available staffing resources in an effective manner; understands College policies and procedures and is consistent in their application.

Supervisor's Comments:

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## **Delegation**

e.g. Assigns responsibilities to staff and motivates them to perform effectively; supervises their productivity; develops personnel.

Supervisor's Comments:

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## **Communications and Human Relations**

e.g. Prepares written reports and documentation which achieve their purposes; presents ideas clearly and convincingly; expresses himself/herself effectively to individuals and in groups; hears others, respects their input; maintains effective working relationships; clarifies support expected from supervisor; advises supervisor when support is adequate or inadequate.

Supervisor's Comments:

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## **Self-development / Career Planning**

e.g. Identifies weaknesses in own managerial skills and style; seeks advice of others, as appropriate; seeks support, as needed; is open and willing to learn; seeks actively to improve skills; seeks new challenges and opportunities for development.

Supervisor's Comments:

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**4.0 GENERAL COMMENTS AND RECOMMENDATIONS**

Comments regarding overall performance:

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Recommendations for action:

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\_\_\_\_\_  
Signature of Manager

\_\_\_\_\_  
Signature of Supervisor

\_\_\_\_\_  
Date

## **GUIDELINES FOR SETTING ANNUAL OBJECTIVES**

Objectives for managers are crucial to the development and advancement of any institution. Objectives serve to set and define direction for the institution, and they serve as a basis for ascertaining whether the institution and the management group are progressing on the road to excellence.

Objectives should represent collectively the institution's and the managers' priorities for the year. They should conform to the principles put forth in these guidelines.

There should be coherence in the institution's overall management objectives. The objectives should do two things:

- Enable the Director General and the Academic Dean to accomplish their objectives, as set by the Board;
- Define the specific major tasks to be attained or commences in the current year in each manager's general area of responsibility.

Objectives should provide an appropriate challenge for the individual's position.

Objectives should be measurable and attainable; criteria for measuring the achievement of objectives must be included.

Objectives may span more than one year, but in a long-term objective, the specific goals to be accomplished on a yearly basis should be designated.

Objectives are signed by the manager and the supervisor.

## FORMAT FOR WRITING OBJECTIVES

- OBJECTIVE:** This is the goal, target or project to be achieved in the context of the objectives adopted by one's immediate supervisor.
- TIME FRAME:** Normally, objectives are set on an annual basis. However, objectives of larger projects may be broken down into more manageable segments.
- RATIONALE:** This is a brief description of the reason for adopting (or proposing) a given objective, which (a) indicates how it complements the objectives of the supervisor, the Academic Dean or the Director General; (b) is set in conformity with a designed "common objective"; or (c) is linked to the manager's job description.
- ACTIVITIES:** This section shall include specific details about how one will go about achieving the objective. Example: Write a proposal; conduct a needs assessment; compile an inventory; do research; establish a committee or action team; assemble and/or re-arrange resources; develop a critical path; execute specific parts of an action plan.
- IMPACT ON OTHER SERVICES:** This consists of a brief description of the impact that undertaking the objective may have on the resources of other services/departments in the College. Specific reference to cross-service objectives should be included here, and shared responsibilities should be clarified.
- MEASUREMENT:** What specific means and criteria will the supervisor use in carrying out the evaluation?