

NEOED PERFORM: Leadership Evaluation Guide

The Leadership Evaluation is intended for department/unit heads and above. This evaluation will perform a 360-degree review that will provide insight from the individual's supervisor, direct reports, and identified colleagues.

The intent of this guide is to assist supervisors in the process of carrying out the evaluation.

As you carry out the evaluation, please visit the [Perform webpage](#) on the HR website for additional information and resources or contact employment@andrews.edu if you have any questions.

Due Dates

Annual Evaluation: March 31st

- 35 days before Evaluation Due Date: Employee & Direct Reports Evaluation
- 21 days before Evaluation Due Date: Supervisor (Manager) Evaluation
- 14 days before Evaluation Due Date: Next Level Supervisor (Manager's Manager) Approval & Signature
- 7 days before Evaluation Due Date: Supervisor (Manager) Approval & Signature
- Evaluation Due Date: Employee Signature

The exact dates can be viewed under the **Process** tab in the evaluation

Creation of the Evaluation

Once the system creates the evaluation, whether it is the initial review or the annual review, you as the supervisor will have received an email notifying you that the evaluation has been created. At the same time, the employee that will be evaluated will have received an email notifying them to complete their self-evaluation. This will be the first task of the evaluation.

Note: for the first year implementation, a pre-task for the employee will be to enter their prior year's goal, by accessing and copying from the [old evaluation system](#). For future years' evaluations, goals will flow over from one year to the next.

Accessing the Evaluation

To access the evaluation, either click on the link provided in the email notifying you of the created evaluation or log in to www.andrews.edu/go/perform.

On the main NEOED dashboard, once any prior tasks are complete, you will see a listing of your current tasks including what evaluations need to be completed. For purposes of this guide, we will focus only on the evaluations that read **Annual Evaluation for Leadership**.

The screenshot shows the Andrews University NEOED dashboard. At the top, it says "Andrews University". Below that, there's a "Tasks" section with a "View All (4)" link. Under "Tasks", there are two tabs: "To-Do (2)" and "Overdue (2)". Below the tabs, there's a filter for "View my tasks related to:" with options: "All", "Myself", "My Direct Reports", and "Others". The main content area shows a task card for "PERFORMANCE - RATING" with a star icon. The task is "Rating For Beverly Brown's Annual Evaluation for Leadership (due 03 / 31 / 2026)" for Beverly Brown. A red arrow points to this task card. The due date is "Due 03/16/26".

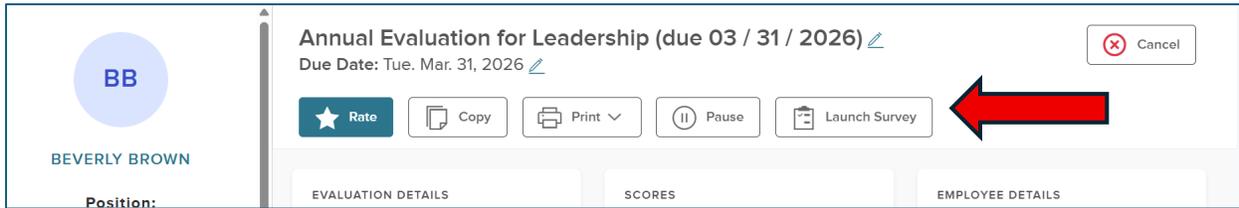
Initiating Surveys (feedback from employee's colleagues) & Direct Report Feedback

1. As the supervisor, first meet with the employee of this evaluation and dialogue with them to establish 3 – 4 colleagues to participate in the evaluation. The colleagues should be individuals that both you and the employee agree can provide objective feedback on the employee's performance during the past year. For purposes of this evaluation, a colleague is someone that works regularly with the evaluated employee at approximately the same level but does not report to the evaluated employee. The supervisor conducting the evaluation should ask to make sure that these colleagues are willing to participate in the evaluation.

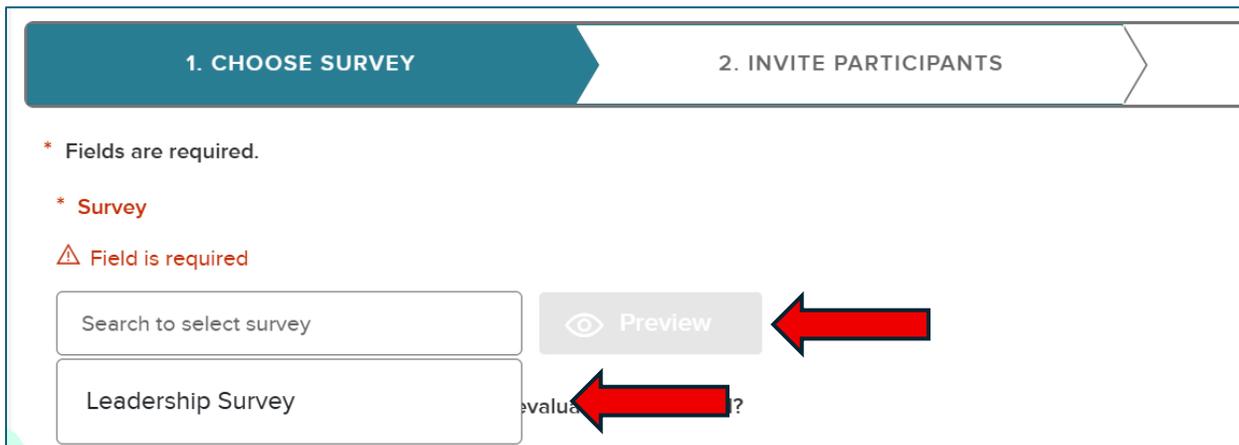
To assign the evaluation to the defined colleagues, click **Go to Evaluation Details**

The screenshot shows the "Go to Evaluation Details" page. At the top, there's a "Go to Evaluation Details" link with a red arrow pointing to it. To the right of the link are buttons for "< Previous Section", "Next Section >", and "Submit Evaluation". Below the link, there's a profile card for Beverly Brown, ASSOC DIRECTOR, HUMAN RESOURCES. The main content area is titled "Employee Feedback" and has a "NARRATIVE SECTION | TEXT ONLY" label. There's a "Collapse Supplemental Resources" button and a "Reviewer Entries" dropdown menu.

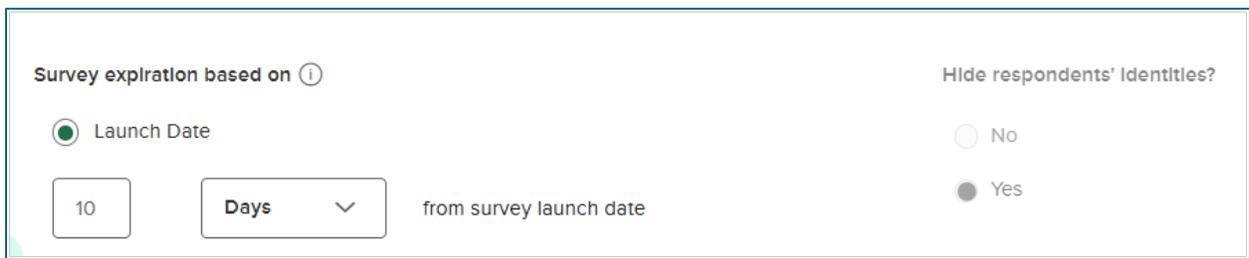
2. Next, click on **Launch Survey**



3. Click on the survey field and select the **Leadership Survey**; after selecting the survey, you may view the questions that will be asked by clicking on **Preview**



4. **Do not** make changes to the *Survey expiration* date section; please be sure to launch the surveys as soon as possible so that there is enough time to get their feedback before your rating task is due.



5. At the top of the page, press **Save and Continue**



- To invite participants that you want to fill out the survey, type and then select each from the drop-down list. On the right side (yellow star) you will see how many participants you have selected. **Please note: once you have selected the “Launch” button, you will not be able to send surveys to additional individuals.**

1. CHOOSE SURVEY 2. INVITE PARTICIPANTS

Who would you like to invite as a participant for this Survey ? Total Participant Count: 0

You may invite existing Perform employees using employee lookup on the left or invite employees by their email address on the right.
At least one person must be selected before the "Launch" button becomes active.

ⓘ **Note:** You will not be able to invite additional participants, once the survey is launched.

Invite Participants by Name Invite Additional Participants by Email

Search to select participants [Search box with magnifying glass icon]

- Now click on the **Launch** button. This will send an email to your survey participants with a link for them to participate in the survey. **Reminder: once you have selected the “Launch” button, you will not be able to send surveys to additional individuals.**

Launch Survey Launch

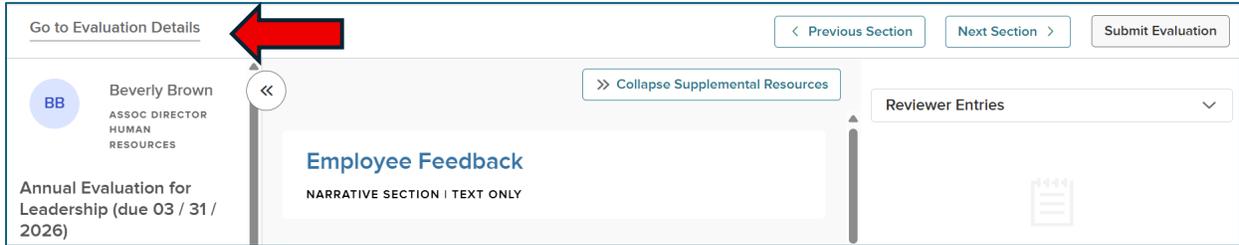
EVALUATION: Annual Evaluation for Leadership (due 03 / 31 / 2026)
EMPLOYEE: Beverly Brown

1. CHOOSE SURVEY 2. INVITE PARTICIPANTS

- In addition to colleague feedback, direct report(s) of the employee, as displayed in NEOED, receive an email asking for their participation in the evaluation. Direct report ratings happen concurrently with employee self-rating; they have the same deadline. However, direct report ratings are optional and will not keep the evaluation from progressing to the next step.

Viewing Survey Results

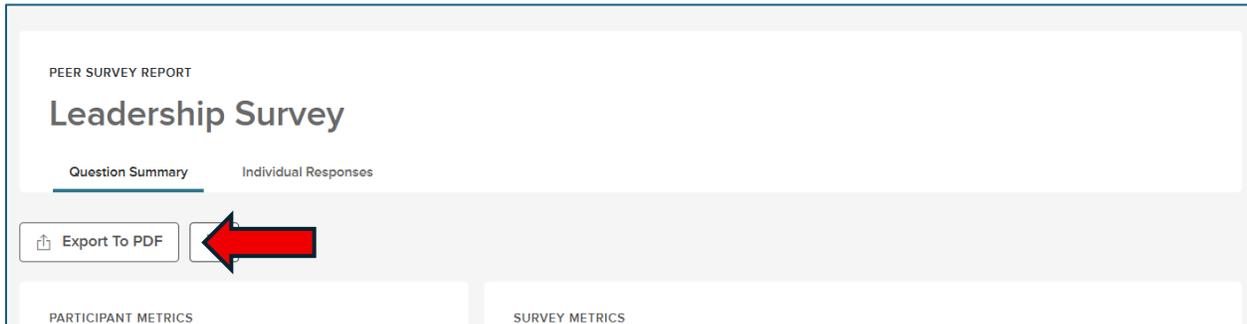
1. Before starting to rating section, click **Go to Evaluation Details**



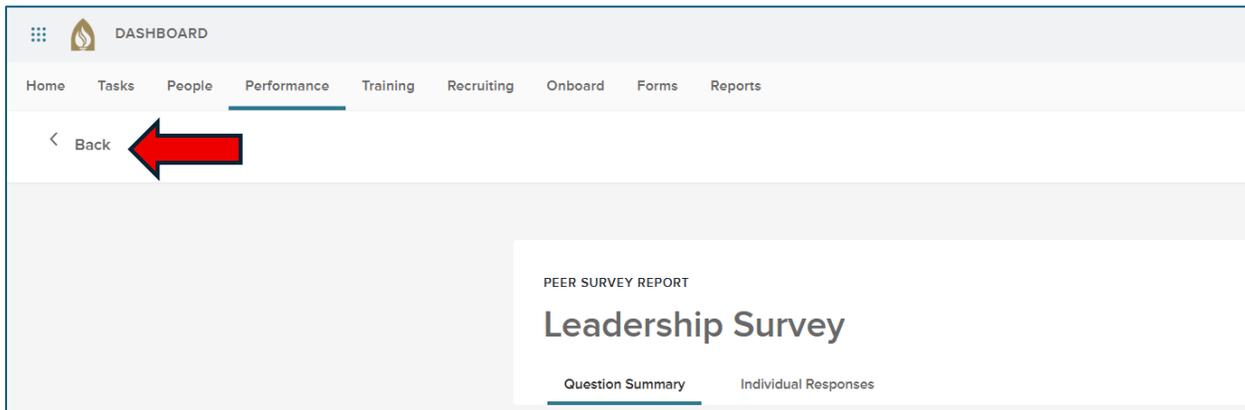
2. Now select **View Survey Results**



3. Here you will be able to see the responses from the survey sent to the employee's colleagues to help guide you in completing the evaluation. Note that you can download these responses to a PDF.



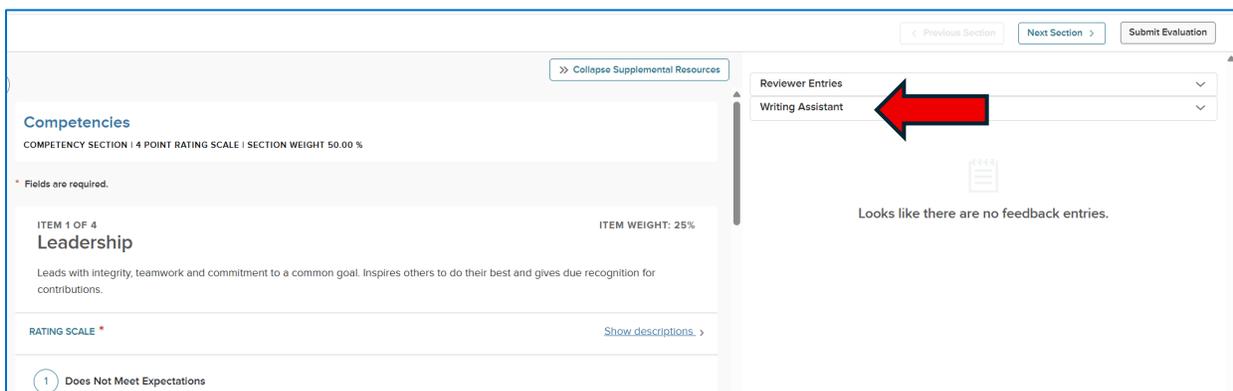
4. To return to the evaluation, click on the **Back** button in NEOED Perform



Supervisor Rating

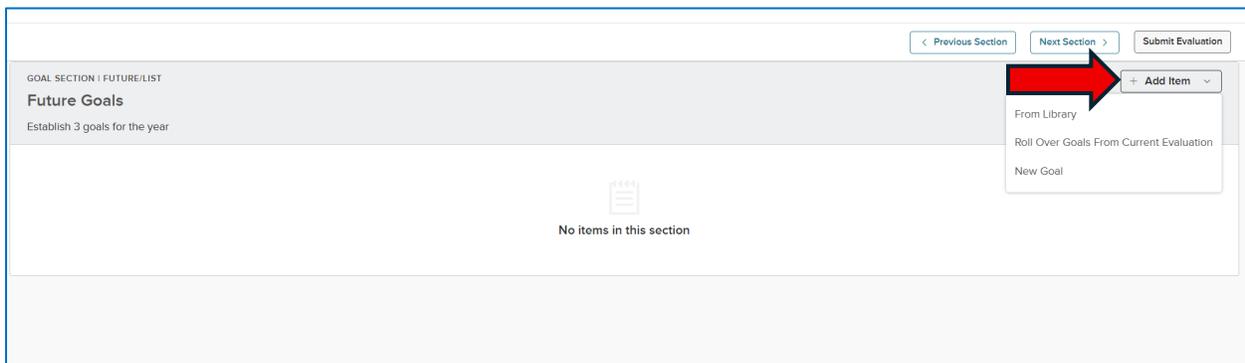
1. The first section will be rating the employee, based on four Competencies: Leadership, Communication, Decision Making, and Employee Engagement. Your rating will be based on a 4-point rating scale:

- 1 (Does not meet Expectation)
- 2 (Needs Improvement)
- 3 (Meets Expectations)
- 4 (Exceeds Expectations)
- Please note that any item that you rank as 1, 2, or 4 will require that you add something in the comment's section. You may utilize the **Writing Assistant** menu to choose pre-made text that you can edit for the comment section of each competency.



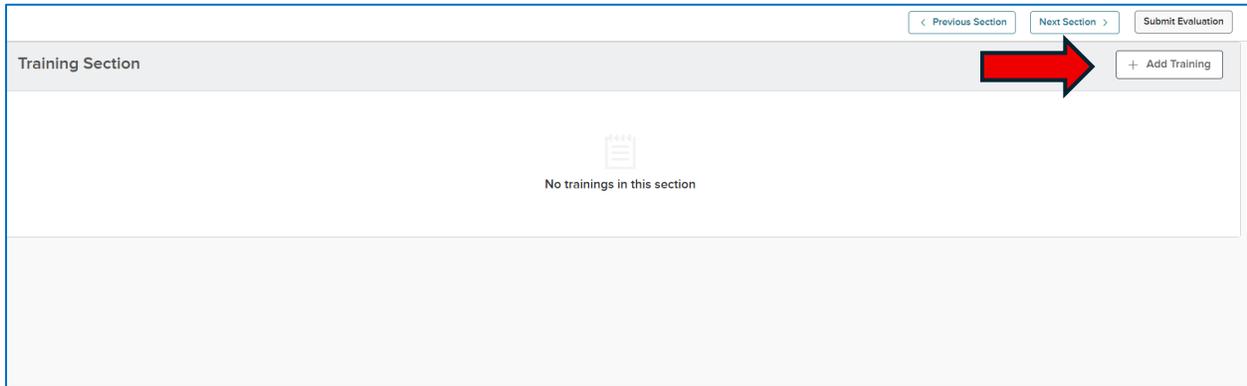
Note: Reviewer Entries (above the **Writing Assistant** on the right hand menu) are the Direct Report feedback, mentioned in the section above

2. The next rating section will be on the prior year's goals; the rating scale is the same and the writing assistant will also be available.
3. The **Proposed Future Goals** section will have been completed by the employee. Review and consider their entries as you complete the next section.
4. Next, you will be asked to establish 3 goals for the next year. Click the **Add Item** button to develop a goal for the next year. This will open up three options to choose from: From Library, Roll over goals from Current Evaluation, and New Goal.



5. When choosing a New Goal you will indicate the goal name, a due date, and whether the goal is organizational, departmental, or individual. Describe what is expected in the goal. You can also under **Additional Settings**, establish the priority level for accomplishing the goal and under **Reminder Settings** identify if reminders should be sent out and if overdue notices should be sent out for that goal.

6. The next section of the evaluation is the training section. Here you can specify training for the employee's professional development or skill acquisition. To do so, click the **Add Training** button. Search the Learn Course Catalog and select desired courses.



The screenshot shows a web interface for the 'Training Section' of an evaluation. At the top right, there are three buttons: '< Previous Section', 'Next Section >', and 'Submit Evaluation'. Below these, on the left, is the text 'Training Section'. On the right, there is a red arrow pointing to a '+ Add Training' button. The main content area is empty, displaying a document icon and the text 'No trainings in this section'.

7. The overall rating is the last rating step. This is a final score that can be provided to the employee that consolidates all of the evaluation. Please remember to add comments if you rate the employee as 1 (Does not meet Expectation), 2 (Needs Improvement), or 4 (Exceeds Expectations).
8. Finally, you can submit the evaluation. The evaluation will first go to the Employee's Next Level Supervisor (Manager's Manager), then to yourself as the Supervisor (Manager), and finally to the employee being evaluated.