

All associates will self-evaluate this year. Your feedback matters!

## Instructions to Complete a Self-Evaluation:

- 1) To begin, go to Essex Okta SSO dashboard > Click on the 'SuccessFactors' icon.  
Alternatively, a direct link is also provided on Buzz.
- 2) Click on the 'Self Evaluation' link with the 'To Do' section of your dashboard.
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1 Via: <https://essex.okta.com/>

Buzz Link

Associate Resources

Holiday schedule: Corporate | Field

Kronos timekeeping

Training: Calendar | New-Hire | Wiki | LMS Learning Bridge | Lynda.com

Success Factors (performance evals)

UltiPro: HR self-service

iCIMS: Recruiting

2 Home

To Do

Sort by Date | Type

Due Later (1)

OCT 15 Self Evaluation for Patti LaBelle

Due Anytime (2)

Recently Completed (1)

Click on the link to being your self evaluation.

3) The **Navigation Tool Bar** will remain at the top of your screen as you complete your evaluation. You can see updates to your “Overall Score” and “Incomplete Items” as you progress through the evaluation. You can also use this tool bar to save, print or pdf the evaluation.

4) The **Route Map**, also known as the **Workflow**, provides a step by step guide to completing the evaluation. Each step **MUST** be completed before you can advance to the next step in the process.

**3**

**4**

**1—Self-Evaluation:** Associates complete a self-evaluation in this step. This is your opportunity to showcase your performance during the evaluation period by scoring and commenting in each section or competency.

**2— Manager Evaluation:** Managers complete the official evaluation of the associate in this step.

**3— Review:** 2nd Level Manager reviews and approves the evaluation.

**4 — Manager Signature:** Managers should schedule their one-on-one meeting with their associate in this step; once the meeting takes place, electronically sign the form. Ensure the associate also electroni-

**5 — Associate Signature:** Associates should electronically sign the form to acknowledge receipt and review of the performance evaluation.

# Operations Self—Evaluation: Rating Scale

5) The Rating Scale provides a structured and standardized approach to measure performance.

The Success Factors evaluation provides a summary version of the **1—5 Rating Scale**, but further details are described here.

## Introduction

This evaluation consists of five sections: Critical Functions, Expectations of Employment, Individual Performance Goals, Describing Your Long Term Goals, and Performance Summary. The following rating scale provides a structured and standardized approach to measure performance.

1. **Unsuccessful/Unacceptable Performance:** Performance fails to meet minimum expectations for this role, and immediate and sustained improvement is required.
2. **Partially Successful Performance/Needs Improvement:** Performance does not consistently meet or occasionally falls below what is required of the position; improvement in specific areas is required.
3. **Fully Successful/Effective Performance:** Performance consistently meets the critical requirements of the position, continually achieves preset goals and performs with distinction.
4. **Superior/Highly Effective Performance:** Performance is continually and consistently superior and regularly goes beyond what is expected.
5. **Distinguished Performance and role Model Status:** Clearly and consistently demonstrates extraordinary and exceptional accomplishment in all major areas of responsibility.

Rating Scale 1-5

[Less](#)

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There are three main sections (A, B, C) that you must complete for your self-evaluation.

## Critical Functions—Section A

6) The first section to complete is the **Critical Functions**. Five main competencies make up this section.

- Community Operations
- Fiscal Management
- Customer Service/Market Knowledge
- Leadership/Personnel Management
- Administrative/Other Duties

The relative importance of each area differs by position, so each area is weighted accordingly. Please refer to the 2016 Evaluation Manager Handbook located on Buzz page for a breakdown of the weights.

**Please Note:** Not all positions have five competencies in their Critical Functions.

**Please make sure to include notes in the comments section for each competency.**

### Critical Functions (50.0%)

Critical Functions list abilities (knowledge, skills, traits) needed to perform the functions of a specific role. The relative importance of each differs by position. The purpose of this section is to evaluate individual performance compared to company expectations as it relates to every team members role.

#### Administration/Other Duties

- Adapts to change and follows instruction
- Receives constructive criticism in a professional manner
- Completes error free, high quality reports in a timely manner
- Proficient in computer applications and usage as it relates to property management
- Completes all company required training in a timely manner

\* Rating   
 ★★★★★☆ Superior/Highly Effective Performance

#### \* Subjects Comments

**B I U** | | | | | | |

I am open to feedback and always willing to learn. For instance, my manager recommended some ideas that would help me improve my sales skills. I incorporated those ideas into my work and took additional training classes. By making these changes, I was able to increase my closing ratio by 40%.

This is a required field. The form will not route if it is empty.

Please make sure to include detailed comments with specific examples to support your ratings.   
**Please Note:** Insufficient comments may result in your manager returning the self-evaluation to you for more details.

Ratings from Others   
 There are no Ratings from Others.

\* Rating   
 ★ Performance Rating Scale

Atte 1.0 Unsuccessful/Unacceptable Performance:   
 Dispo Performance fails to meet minimum expectations for this role, and immediate and sustained improvement is required.

\* Re 2.0 Partially Successful Performance/Needs Improvement:   
 ★ Performance does not consistently meet or occasionally falls below what is required of the position; improvement in specific areas is required.

Cor 3.0 Fully Successful/Effective Performance:   
 Spea Performance consistently meets the critical requirements of the position, continually achieves preset goals and performs with distinction.

\* Re 4.0 Superior/Highly Effective Performance:   
 ★

Clicking the question mark icon will provide detailed information on the rating scale.

## Expectations of Employment— Section B

7) The second section to complete is the **Expectations of Employment** section. This section lists behavioral competencies required of all associates regardless of their position.

The competencies are:

- Accountability
- Appearance
- Attendance
- Attention to Detail
- Communication Skills
- Initiative
- Reliability
- Safety
- Teamwork

At the end of this section, there will be one overall comment box. Please use this to provide specific examples that support your ratings for the Expectations of Employment section.

### Expectation of Employment (20.0%)

The purpose of this section is to evaluate performance alignment in the behavioral competencies required of all Essex team members irrespective of their position. Essex team members are expected to demonstrate proficiency in these competencies as they relate to their role.

#### Accountability

Accepts work assignments and takes ownership of shortcomings and commits to corrective actions. Identifies and overcomes roadblocks or setbacks early to deliver results.

\* Rating ⓘ  
☆☆☆☆☆ unrated

Ratings from Others  
There are no Ratings from Others.

#### Appearance

- DO NOT RATE HIGHER THAN A 3 -

Maintains a professional appearance at all times. Compliant with E-Apparel policy and wears name tag/ID badge during work hours.

\* Rating ⓘ  
★★★★☆ Fully Successful/Effective Performance

Ratings from Others  
There are no Ratings from Others.

**Please note:** There are three behavioral competencies that **should not be rated higher than a 3:**

Appearance  
Attendance  
Safety

#### Attendance

- DO NOT RATE HIGHER THAN A 3 -

Comes to work on time and takes necessary breaks and meal periods. Uses timekeeping system effectively.

\* Rating ⓘ  
★★★★☆ Fully Successful/Effective Performance

Ratings from Others  
There are no Ratings from Others.

#### Attention to Detail

Displays concern for thorough and complete work. Delivers high quality results on time and understands the "bigger picture".

\* Rating ⓘ  
★★★★★ Distinguished Performance and role Model Status

Ratings from Others  
There are no Ratings from Others.

### Section Comments:

\* Subjects Comments

**B I U** | | | | | | | |

**Provide specific examples to support your ratings in this section.**

