

Exempt Employee Performance Review



SECTION 1

Personal Information

(Please print clearly and provide complete & accurate information)

Employee Name: _____ Current Review Period: _____ to _____

Job Title: _____ Department Name: _____

Evaluating Manager: _____ Today's Date: _____

SECTION 2

Employee Job Description

Please describe employee's position during current review period: _____

SECTION 3

Performance Categories and Criteria

Please evaluate the employee's contributions over the past review period as measured by the following:

1. Results Focus

- Accomplishes expected workload and achieves targeted results
- Performs duties and responsibilities thoroughly and reliably
- Contributes to the achievement of department/division goals and priorities
- Commitments and deadlines are consistently met through good use of job knowledge and skills
- Employee demonstrates well-developed focus on bottom-line results

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

2. Work Quality

- Quality of work exceeds standards and expectations
- Improvements to quality and/or processes are consistently evaluated and implemented
- Standards for accuracy and completeness are consistently met
- Is resourceful and innovative in his/her work
- Delivers attentive service and responds appropriately to requests for assistance.

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

3. Planning / Organization

- Plans, prioritizes, and organizes work effectively
- Identifies and uses resources effectively and responsibly
- Identifies and works to solve problems as they arise
- Is self-directed and works well with minimal supervision

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

4. Professional Relationships

- Actively participates and contributes as a member of effective work teams
- Builds cooperative working relationships and contributes to the resolution of conflict
- Able to influence others in support of work being completed
- Works effectively with other departments, groups, or divisions in support of common goals
- Contributes to the development of departmental objectives

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

5. Communication

- Communicates clearly and effectively both orally and in writing
- Listens actively and responds appropriately
- Receives and provides constructive feedback
- Uses appropriate channels of communication to convey information and ideas effectively

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

6. Analytical Problem Solving

- Offers constructive suggestions for improving work
- Generates creative ideas and solutions
- Initiates change when necessary
- Acquires and analyzes all relevant information before making decisions
- Provides appropriate alternatives when making recommendations

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

7. Adaptability / Flexibility

- Changes in the job or work environment are usually anticipated and proactively addressed
- Changes are viewed positively and are seen as potential growth opportunities for the group
- Workloads and priorities are reassigned to meet changing business needs
- Competing demands are generally dealt with in the appropriate manner

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

8. Decision Making / Judgement

- Reviews information logically and sequentially
- Seeks input from all sources and addresses root cause of issues
- Keeps management appropriately informed of potential issues, risks, and challenges
- Communicates decisions with confidence

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

9. Job Specific Competencies

Use this section to list and rate any additional Competencies not yet addressed in this review.

Competency: _____

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

10. Job Specific Competencies

Use this section to list and rate any additional Competencies not yet addressed in this review.

Competency: _____

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

11. Job Specific Competencies

Use this section to list and rate any additional Competencies not yet addressed in this review.

Competency: _____

Does Not meet	Partially Meets	Meets Expectations	Above Expectations
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: : _____

Significant Achievements During Current Review Period

Please evaluate any significant achievements employee has contributed since last review:

Goal: _____

Result: _____

Goal: _____

Result: _____

Goal: _____

Result: _____

Goal: _____

Result: _____

Goal: _____

Result: _____

Expected Results

Identify any particular performance expectations, job duties, or goals employee should strive for during next review period:

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Goal: _____

Completion Date: _____ Add'l Training/Resources Needed: _____

Overall Performance Rating

Instructions: As objectively and accurately as possible, summarize all aspects of this performance appraisal and assign an Overall Performance Rating.

- ☐ **4 Above Expectations:** This employee produces results that meet and frequently exceed performance objectives while demonstrating a high level of proficiency in many of the competencies required in his/her job.
- ☐ **3 Meets Expectations:** This employee produces results that consistently meet and may occasionally exceed performance objectives while demonstrating proficiency in the competencies required in his/her job.
- ☐ **2 Partially Meets:** This employee produces results that do not consistently meet performance objectives and demonstrates only a moderate level of proficiency in the competencies required in his/her job.
- ☐ **1 Does Not Meet:** This employee produces results that usually fail to meet performance objectives and demonstrates only a minimal level of proficiency in the competencies required in his/her job.

Comments and Signatures

Note: The following signatures indicate that the employee and his/her supervisor have mutually discussed all facets of this review, including past and future Expected Results.

Supervisor Comments: _____

Employee Comments: _____

(Attach additional comments if necessary)

Supervisor

Date

Employee

Date

Human Resources

Date