

Employee Name:

Title:

Employee ID:

Time in position:

Department/
School/Unit:

Review Period:

Supervisor:

Time under rater's
supervision:

Exempt Employee Performance Review Form

Part I: Performance Standards

	Exceeds Standards	Successfully Meets Standards	Does Not Meet Standards
Exceeds Standards:	The staff member's work is consistently outstanding for this position. Demonstrates broad knowledge of the functional area; identifies critical issues and provides proposed solutions; plans and organizes work with limited supervisory help; communications are clear and concise; promotes teamwork; suggests improvements to policies and procedures; meets a high standard of accountability. Must provide justification for this selection in the comment field.		
Successfully Meets Standards:	The staff member performs work requirements accurately, completely and timely. Demonstrates work skills that consistently meets work expectations. Manages work efficiently; identifies problems and issues with adequate solutions; communications are appropriate for the defined audience; works respectfully with others; and meets commitments.		
Does Not Meet Standards:	The staff member fails to perform work assignments that meet job requirements or standards. Staff member needs frequent supervision and direction, quality and/or quantity does not meet job standards and performance is below expectation. Requires improvement. Must provide justification for this selection in the comment field.		
1. Service Excellence Values: Ability to demonstrate behaviors that indicate support of the mission of the University and enthusiasm for working as part of a team to achieve departmental excellence.			
2. Professional Knowledge: Possesses and applies relevant knowledge, skills, and abilities; needed for effective performance of responsibilities. Produces measurable results with appropriate level of effort. Aligns work objectives with institutional goals.			
3. Professional Judgment/Analytical Ability: Ability to evaluate situations and select courses of action that reflect sound institutional thinking. Applies sound work ethics and standards. Decisions and work processes incorporate the interests and needs of those served.			
4. Oral and Written Communication: Ability to clearly express facts, ideas or thoughts. Communicates effectively with people at all levels of the University community.			
5. Organization and Planning: Ability to systematically structure tasks, make plans and set objectives, establishes priority and schedules, and use record keeping systems.			
6. Quality of Productivity: Ability to produce work that is dependable, accurate, contributes to accomplishment of department goals. Establishes and maintains high work standards.			
7. Interpersonal Relationships: Ability and willingness to collaborate with colleagues on teams to accomplish goals and support institutional initiatives. Expresses disagreement tactfully and sensitively. Respectful of others.			
8. Initiative: Ability to independently identify and complete work or projects. Seeks additional assignments and/or assumes additional duties when necessary.			
9. Application of Policies and Procedures: Ability to understand, adhere to and communicate established University policies and practices.			
10. Accountability: Accepts responsibility for commitments, acts in best interest of campus community. Follows University Code of Conduct.			

Scoring for Part I:

Exceeds Standards:	Staff member receives THREE (3) or more Exceeds ratings with no Does Not Meet Standards.	Exceeds Standards	Successfully Meets	Does Not Meet Standards
Successfully Meets Standards:	Staff Member receives no more than TWO (2) Does Not Meet Standards.			
Does Not Meet Standards:	Staff member receives THREE (3) or more Does Not Meet Standards.			
Any staff member that has an overall rating of "Does Not Meet Standards" in Part I, must be placed on a Performance Improvement Plan. The Rater must contact The Office of Human Resources for support.				
*comment on how employee demonstrated each valued behavior during the timeframe. At a minimum, provide specific examples for each and every area that was marked as "Exceeds" or "Does Not Meet Standards" above; also provide examples of areas of strength and opportunities for development. Overall rating:				

Part II. Acknowledgement

I acknowledge by my signature that I have read this evaluation and have discussed it with my supervisor. In addition, I acknowledge that I am aware of the Catholic University Code of Conduct.

Employee's Signature:	Date:
I have discussed this evaluation with the employee	
Rater's Signature:	Date:
Rater's Name (Print)	
I have reviewed the evaluation	
Unit/Department Head's Signature:	Date:

Part III: Goal and SLA Setting (optional for positions that are goal driven)

Setting performance goals should be a shared responsibility between manager and employee that builds commitment and ownership. It sets the stage for effective communication and expectations that are mutually understood.

A measurable **goal** should establish concrete criteria for measuring progress toward the attainment of each **goal** you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your **goal**.

For some positions, the goal is to maintain excellent service levels. For these positions, their goals should reflect a Service Level Agreement (SLA) for the employee to meet with their “customers”. All employees should have goals or SLAs.

Goal Setting for the Upcoming Evaluation Period

Goal or SLA	Task and Measurement	Target Dates

Examples of Goals

Examples of measurable goals:

- Develop and implement a student enrollment promotion program for the fall semester that increases enrollment by 2% over the prior year's 2009 figures.
- Deliver a training course on effective performance appraisals to 80% of new managers within the next year.
- Successfully close 90% of all student requests with 1-business day of receipt with a rating of 8 or higher. (SLA)

Examples of non-measurable goals or SLAs:

- Implement a comprehensive Family and Medical Leave Act (FMLA) training program. Although “implement” is an outcome, it doesn’t establish a measurable criteria to judge completion.
- Revise the admissions policy and rules handbook. Because “revise” is a process, not an outcome.

Update on previous year Goals (if goals were set during the last evaluation period)

Goal or SLA	Task and Measurement	Status

****How to save & submit this form:**

Click 'File' and then 'Save As...'

1. Save the fillable review with the following naming convention:

<Last Name>, <First Name>, <Exempt Performance Period Evaluation>, <date -- four digit year, two digit month, two digit day>

2. Once completed send it to HR-EmployeeRelations@cua.edu

3. Share feedback with the employee