

**Exempt Staff
Annual Performance Appraisal**

Employee Name:

Position:

Evaluation Period: (e.g. September 1, 2022 through August 31, 2023)

Evaluation Process: Exempt staff should be formally evaluated on an annual basis using this form. Additionally, supervisors and managers should be checking in with staff on a regular basis, at least quarterly, to informally review progress on goals/performance and to discuss accomplishments and challenges. The combination of the formal evaluations with the informal “check-ins” ensures effective feedback and communication to support employee success.

PART I: Review of past goals, work priorities, key activities, primary duties, and achievements:

In this section you will discuss: (a) the goals that were established in the prior review for the year; (b) the progress made in achieving these goals, as well as significant accomplishments (please include any relevant assessment data related to each goal); (c) what, if anything, contributed to success in meeting these goals; (d) reasons why these goals were not, or only partially, met. *If the employee has not had a prior review, you should leave this portion blank.* The number of goals may vary. You can include more or less than the 4 goals identified on this form. (Attach extra pages, if needed).

(a) Discuss the goals that were established in the prior review for the year.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

(b) Discuss the progress made in achieving these goals, as well as significant accomplishments. Include any relevant assessment data related to each goal.

Goal 1:

Goal 2:

Goal 3:

Goal 4:

(c) Briefly discuss what, if anything, contributed to success in meeting these goals.

(d) Briefly discuss reasons why these goals were not, or only partially, met. What relevant factors were things the employee was responsible for and which were things that were out of their control?

PART II: Evaluation of Employee Performance

Discuss and assess the performance of the employee according to the criteria listed below, giving reasons for the assessment standard you have chosen (i.e. does not meet expectations, meets expectations, exceeds expectations, or does not apply). Supervisors can consider level of experience when issuing performance ratings.

	Performance Expectations Comments and/or examples (Attach extra pages, if needed)	Performance Ratings
Mission and Values		
Demonstrates commitment to and support of EWU's mission, values and strategic plan		<input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply
Demonstrates commitment to and support of EWU's culture of diversity, equity, and inclusiveness		<input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply
Professionalism		
Timely completes job assignments		<input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply

<p>Engages in effective written, verbal, and nonverbal communication including clear messaging, effective listening, and adapting communication style to meet needs of different audiences</p>		<ul style="list-style-type: none"><input type="radio"/> Outstanding*<input type="radio"/> Exceeds Expectations<input type="radio"/> Meets Expectations<input type="radio"/> Needs Improvement<input type="radio"/> Unsatisfactory*<input type="radio"/> Does Not Apply
<p>Demonstrates accountability for job responsibilities</p>		<ul style="list-style-type: none"><input type="radio"/> Outstanding*<input type="radio"/> Exceeds Expectations<input type="radio"/> Meets Expectations<input type="radio"/> Needs Improvement<input type="radio"/> Unsatisfactory*<input type="radio"/> Does Not Apply
<p>Works collaboratively and assists coworkers when needed, fostering teamwork</p>		<ul style="list-style-type: none"><input type="radio"/> Outstanding*<input type="radio"/> Exceeds Expectations<input type="radio"/> Meets Expectations<input type="radio"/> Needs Improvement<input type="radio"/> Unsatisfactory*<input type="radio"/> Does Not Apply
<p>Demonstrates reliability by consistently delivering high-quality work</p>		<ul style="list-style-type: none"><input type="radio"/> Outstanding*<input type="radio"/> Exceeds Expectations<input type="radio"/> Meets Expectations<input type="radio"/> Needs Improvement<input type="radio"/> Unsatisfactory*<input type="radio"/> Does Not Apply

<p>Demonstrates civility by maintaining a positive and respectful attitude when interacting with others; handling disagreements/ conflict in a professional and constructive manner; showing empathy for others' feelings and perspectives; being open-minded; and respectfully considering different viewpoints/ideas</p>		<ul style="list-style-type: none"> <input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply
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Leadership

<p>Demonstrates initiative by identifying problems and participating in the development of strategies to solve the issues in support of institutional improvement</p>		<ul style="list-style-type: none"> <input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply
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<p>Ensures effective management of departmental/unit/college funds</p>		<ul style="list-style-type: none"> <input type="radio"/> Outstanding* <input type="radio"/> Exceeds Expectations <input type="radio"/> Meets Expectations <input type="radio"/> Needs Improvement <input type="radio"/> Unsatisfactory* <input type="radio"/> Does Not Apply
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Definitions of Performance Rating Categories

OUTSTANDING*-The employee has exceeded all of the performance expectations for this factor and has made many significant contributions to the efficiency and economy of this organization through such performance.

EXCEEDS EXPECTATIONS - The employee regularly works beyond a majority of the performance expectations of this factor and has made significant contributions to the efficiency and economy of this organization through such performance.

MEETS EXPECTATIONS - The employee has met the performance expectations for this factor and has contributed to the efficiency and economy of this organization.

NEEDS IMPROVEMENT - The employee has failed to meet one or more of the significant performance expectations for this factor.

UNSATISFACTORY* - The employee has failed to meet the performance expectations for this factor.

DOES NOT APPLY – This performance expectation is not part of the expectations for this employee’s position.

* Give specific examples of this employee’s performance.

As a result of the evaluation given above, discuss the following:

What are the employee's greatest strengths?

What are areas where the employee can improve?

PART III: Establishing Goals for Next Review Period:

Considering the items discussed above, identify and describe goals for the next review period. There are no set number of goals, but it need not be more than three or four; identify the number you believe are appropriate. If you need additional space, you can add more pages. The goals should be tied to the institutional, department, college or unit mission, values, and/or strategic plan. The goals should be S: Specific; M: Measurable; A: Achievable; R: Relevant; and T: Time Based (SMART goals).

Goal 1:

Goal 2:

Goal 3:

Goal 4:

PART IV: Miscellaneous/Additional Comments:

Use this section to include any relevant information, comments, or concerns that have not been covered by this form.

Signatures

Evaluation Completed by:

Name of supervisor/manager:

Date:

The evaluation was reviewed with me:

Signature of employee:

Date:

The final copy of the evaluation must be submitted to the Human Resources Office for inclusion in the personnel file. A copy of the final evaluation must be provided to the employee.