

EXEMPT STAFF PERFORMANCE EVALUATION PROCEDURES

Each month Human Resources will notify the appropriate supervisors of exempt staff members for whom a performance evaluation is due that month. In addition to completion of the evaluation form, as part of the evaluation process, the supervisor and employee will review the employee's current job description, and notify Human Resources of any updates that are necessary. The supervisor should schedule a time to meet with the staff member privately. Adequate time should be allowed to ensure that the evaluation meeting is not rushed. **Prior to meeting with the staff member, the immediate supervisor should sign and date the evaluation form, and then obtain the "one-over-one" signature from his/her manager.**

PART I – OVERALL EVALUATION RATING: Supervisor should check one overall rating after completing Parts II, III, and IV. This rating should indicate the staff member's overall performance rating, based on the ratings checked in Parts II, III, and IV.

PART II – PERFORMANCE OVERVIEW (Factors A – F): For each factor the supervisor must mark one circle under "Rating" and one circle under "Progress since last evaluation". The "supporting details" section of each factor should be used to specify examples of an exceptional or sub-standard performance rating. This is especially critical in cases of sub-standard performance ratings.

PART III – SUPERVISORY/MANAGERIAL PERFORMANCE (Factors A – D) (if applicable): For each factor the supervisor must mark one circle under "Rating" and one circle under "Progress since last evaluation". The "supporting details" section of each factor should be used to specify examples of an exceptional or sub-standard performance rating. This is especially critical in cases of sub-standard performance ratings.

If the employee does not supervise any staff members, mark the appropriate factors as "Not applicable". If the employee does not manage a defined area and/or budget, please skip Part II and continue on to Part III.

PART IV – PERFORMANCE IN KEY AREAS

Identify key areas of responsibility or any goals that were previously established for this employee. (Additional pages may be attached if more than three areas are to be identified.) For each area, mark one rating in section (a) and in section (b) indicate whether or not the goal or project was completed or whether it is in process or an

ongoing item. The “supporting details” section should be used to clarify due dates, if any, and any areas of sub-standard performance.

PART V – GOALS FOR NEXT EVALUATION: List specific performance objectives on which the employee will be evaluated in the next performance evaluation. Attach additional sheets if necessary.

PART VI – PROFESSIONAL DEVELOPMENT: Supervisor should describe career goals and/or other professional aspirations the employee has shared with them, and indicate what, if any, specific seminars, courses, etc. that could be of value in helping the employee achieve those objectives. If additional training or knowledge is necessary for improvement of job performance, the supervisor should specify that in this section.

PART VII – ADDITIONAL COMMENTS BY SUPERVISOR (Optional): May be used by the supervisor to make additional comments about the employee’s performance. *Specifics of any performance improvement plan or goals would be included in this section, as well as a follow-up date, if performance is to be reviewed again before the next annual reiview, i.e. review in 90 days, 6 months, etc. This is especially important in situations where sub-standard performance is being addressed.* Additional sheets may be attached.

PART VIII – EMPLOYEE COMMENTS (Optional): Supervisor should allow the employee the opportunity to provide any comments or concerns he/she may have about the evaluation. Additional sheets may be attached.

PART IX – SIGNATURES: The “one-over-one” review must be completed before the immediate supervisor meets with the staff members to conduct the evaluation. After the supervisor has reviewed the evaluation form with the staff members, the staff member should be asked to sign and date this form at the completion of the evaluation meeting.

AFTER THE EVALUATION MEETING WITH THE STAFF MEMBER

A copy of the signed evaluation should be provided to the staff member and a copy should be kept by the supervisor. The original should be enclosed in a sealed envelope, marked “Confidential” and sent to the Human Resources office for placement in the staff member’s personnel file.

If specific timelines have been established for improvement, those dates should be noted by the immediate supervisor on his/her calendar for follow-up.