



## ANNUAL PERFORMANCE REVIEW

<b>Review Period From:</b>	<b>To:</b>
<b>Name:</b>	<b>Title:</b>
<b>Supervisor conducting review: David Westenberger</b>	

**Employment Category:**       Non-Exempt                       Exempt

### INSTRUCTIONS

- The supervisor and employee meet at the beginning of the review period and together identify and prioritize three to five primary job responsibilities from the employee’s job description. Goals, objectives, and special projects may be identified at any time throughout the review period.
- At the end of the review period, the employee self-evaluates his or her performance (job responsibilities, performance factors, and goals/objectives) using the self-review form and performance factors form.
- The supervisor evaluates the employee’s performance of job responsibilities, performance factors, and goals/objectives using the rating scale. Supervisor comments are REQUIRED for any evaluation of “Exceeds Expectations”, “Improvement Needed”, “Fails to Meet Expectations”, and for the OVERALL rating.
- The supervisor then meets with the employee and together they discuss the ratings, and sign and date the form. The review form is then forwarded to Human Resources) for review and filing.
- The job description is to be reviewed annually and updated, if appropriate. If significant changes are made, the supervisor submits an updated copy to the Human Resources Department together with the completed review form.

**RATING SCALE – Use ratings as defined below**

**E – EXCEEDED EXPECTATIONS:** A preponderance of the employee’s work exceeded expectations. The employee consistently did outstanding work, regularly going far beyond what is expected of employees doing this type of work. Performance that exceeded expectations was due to the effort and skills of the employee.

**M – MET EXPECTATIONS:** Performance fully met the established job expectations, and may on occasion have exceeded expectations. The employee generally performs very well and requires little additional guidance.

**I — IMPROVEMENT NEEDED:** Performance met some of the job expectations but did not fully meet the remainder. The employee generally performs at a minimal level and improvement is needed to fully meet expectations. Performance deficiencies were due to the employee’s lack of effort or skills.

**F – FAILED TO MEET EXPECTATIONS:** Performance generally failed to meet the established

expectations or required frequent, close supervision and/or the redoing of work. The employee did not perform at the level expected for employees doing this type of work. Unacceptable job performance was due to the employee's lack of effort or skills.

<b>Performance Factors</b>	<b>Supervisor Rating</b>
<b>Knowledge of Work:</b> Understands assigned duties and responsibilities; establishes priorities and plans work; uses appropriate procedures, tools, equipment and materials for assigned work.	
<b>Quality of Work:</b> Work is complete, neat, accurate, timely and thoughtful.	
<b>Quantity of Work:</b> Completes all assignments within specified time limits; adjusts to unexpected changes in work demands to meet timetables.	
<b>Initiative:</b> Self-starter requires minimal supervision, requests additional assignments or responsibilities; suggests and implements improved work methods.	
<b>Cooperation:</b> Projects a positive work attitude; relates effectively with coworkers, supervisors, and others; uses tact and diplomacy/acts professionally at all times.	
<b>Problem Solving:</b> Identifies problems, secures relevant information and implements solutions.	
<b>Planning and Organizing:</b> Establishes and manages work priorities; efficiently allocates time and utilizes available resources appropriately; effectively handles multiple assignments.	
<b>Communications:</b> Effectively expresses self in individual or group situations; message is clear, concise and easily understood; listens carefully to others.	
<b>Attendance/Punctuality:</b> Dependable, present at work and on time. Absences are properly scheduled and reported.	
<b>EMPLOYEES WITH SUPERVISORY RESPONSIBILITIES</b>	
<b>Leadership:</b> Effectively accomplishes work through others; inspires confidence, provides clear direction, communicates constructive feedback, provides on-the-job training; recognizes and resolves problems.	
<b>Development of Staff:</b> Recognizes and develops skills and abilities of other staff or students in order to promote professional development and to meet organizational objectives; plans and assigns work effectively and equitably.	
<b>ADDITIONAL PERFORMANCE FACTORS (These are specified factors unique to the position being reviewed.)</b>	

<b>GOALS / OBJECTIVES / SPECIAL PROJECTS ASSIGNED DURING THE REVIEW</b>			
<b>Goal/Objective/Special Project</b>	<b>Results Achieved</b>		<b>Supervisor Rating</b>

<b>CAREER DEVELOPMENT</b>	
<p><b>Part I:</b> List training programs, conferences, and courses attended during review period to improve present job skills or for career development.</p>	
<p><b>Part II:</b> List Developmental steps to improve performance and/or prepare for future responsibilities:</p>	
<p><b>EMPLOYEES OVERAL COMMENTS:</b></p>	<p><b>SUPERVISORS OVERALL RATING COMMENTS:</b></p>

Your signature indicates only that you have read and discussed this performance review with your supervisor. It does not necessarily mean that you agree with the comments. If you disagree with your review, explain, either in the space above or on a separate page, the specific areas of disagreement. You may request a copy of the performance review from your supervisor.

I have reviewed the employee's job description:

It is accurate and up-to-date; or

It needs revisions which is my responsibility

\_\_\_\_\_  
**Employee Signature                      Date                      Supervisor                      Signature                      Date**

**I have reviewed this evaluation:** \_\_\_\_\_  
**Chief Executive Officer/or IYSA Board Chair                      Date**