

Performance Evaluation for Exempt Employees

Employer Instructions

1. Review employee's performance for the entire period; refrain from basing judgments on recent or isolated events only. Disregard your general impression of the employee and concentrate on rating one factor at a time.
2. Consider the employee on the basis of the standards expected to be met for the job the employee is assigned based on the length of time in the job. Rate the employee on how well the requirements of the job are fulfilled.
3. Place a check in the box that best describes the employee's performance in that factor since the last appraisal (or date of hire if this is the employee's first review).
4. Keep in mind the relative importance of the factors will vary according to the position.
5. After rating the employee on each factor, provide examples to support your rating, if applicable.
6. Once all job factors are rated, complete the section *Performance Related to Position Requirements* by checking the box that best summarizes the employee's overall performance.
7. Do not discuss any compensation action, or the appraisal, with the employee until you have been notified of its approval.

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Performance Evaluation for Exempt Employees

Employee Name _____

Department _____

Title _____

Time in Present Position ____ Yrs. ____ Mos.

Date of Review ____/____/____

Date of Last Review ____/____/____

Definitions

Outstanding: Performance is distinguished and far exceeds requirements of the job.

Exceeds Expectations: Performance has been exceptional and usually exceeds job requirements.

Meets Expectations: Meets all job requirements.

Needs Improvement: Performance has been below the standards and requirements of the job.

Not Effective: Performance falls well below the standards and requirements of the job and is unacceptable.

	Outstanding	Exceeds Expectations	Meets Expectations	Needs Improvement	Not Effective
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I. Knowledge and Skills

Job Knowledge

Possesses and applies the necessary knowledge and mechanical skills for the position.

Examples

Professional Development

Participates in training programs, takes advantage of other educational opportunities, reads professional publications to stay current on new developments and methods related to position.

Examples

II. Planning and Management

Delegating Responsibility

(if applicable)

Delegates responsibility to subordinates, clearly explains work instructions, and follows plans.

Examples

	Outstanding	Exceeds Expectations	Meets Expectations	Needs Improvement	Not Effective
Planning Demonstrates ability to plan and schedule work activities effectively, arranges workload to resources available to get desired result, allows flexibility in planning to accommodate changing needs by adopting alternate plans, and copes well with unexpected occurrences through proper planning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Problem Solving Demonstrates ability to evaluate problems and situations calmly and identify problem areas which need to be addressed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Time Management Organizes work to use time effectively and efficiently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Evaluating Subordinates (if applicable) Follows organization's policies and procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
III. Performance					
Meeting Deadlines Works effectively under heavy workload and meets agreed-upon stated deadlines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Decision Making Demonstrates effective decision making skills. Makes suggestions and demonstrates initiative in executing directed tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					

	Outstanding	Exceeds Expectations	Meets Expectations	Needs Improvement	Not Effective
Following Instructions					
Follows directions and asks questions as necessary to meet desired results.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Goals and Objectives					
Sets goals and objectives, consistent with company goals, and develops plans in concert with immediate supervisor to achieve the desired goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
IV. Communications and Customer Service					
Oral Communications					
Demonstrates effective oral communication skills and conveys information in a clear and concise manner.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Written Communication					
Demonstrates effective written communication skills and conveys ideas and information in written format. Prepares and completes clearly written, well-organized documents free of grammatical, punctuation, and spelling errors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					
Peer Relations					
Cooperates with others to effectively and efficiently accomplish work and help create and maintain good working relationships, provide assistance and back-up when necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Examples					

	Outstanding	Exceeds Expectations	Meets Expectations	Needs Improvement	Not Effective
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Supervisory Relations

Cooperates with immediate supervisor to accomplish work effectively and efficiently, provides effective assistance, training and back-up when applicable, and provides a system of oral and written communication.

Examples

Subordinate Relations

(if applicable)

Cooperates with subordinates to accomplish work assignments effectively and efficiently, helps create and maintain good working relationships, provides effective assistance, training and back-up, and provides a system of written and oral communication.

Examples

V. Professional Conduct

Punctuality and Attendance

Rarely absent, works required hours, and arrives punctually to work and scheduled meetings.

Examples

Accountability

Accepts responsibility for actions and/or accomplishments.

Examples

Supervisor's Remarks and Recommendations

Specific Development Plan/Goals

Employee Comments

Employee Signature

____/____/____
Date

Performance Related to Position Requirements



Outstanding

Performance is distinguished and far exceeds requirements of the job.



Exceeds Expectations

Performance has been exceptional and usually exceeds job requirements.



Meets Expectations

Meets all job requirements.



Needs Improvement

Performance has been below the standards and requirements of the job.



Not Effective

Performance falls well below the standards and requirements of the job and is unacceptable.

Evaluated by

____/____/____
Date

Reviewed by

____/____/____
Date