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| STRICTLY CONFIDENTIAL |
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 |
| **Exempt Employee Self-Review**  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Your Name:** |       |  **Your Title:** |        |
| **Your Dept:** |       |  **Date of Self-Review:** |        |

**General Instructions:**

You should use this form to complete a Self-Review of their performance. In each section, select a rating for each competency based on your past year’s performance. Add specific comments to support your rating if desired.

Direction on Use - Tab to each field to move through the document. Comment sections will expand as information is typed in. ONCE COMPLETED, SAVE AN ELECTRONIC COPY AND SEND YOUR COMPLETED FORM TO YOUR MANAGER BY THE MUTUALLY AGREED UPON DEADLINE

**Rating Definitions:**

5- Outstanding- Exceptional at meeting and exceeding performance expectation

4- Very Good-Excels at meeting performance expectations

3- Good- Meets performance expectations

2- Needs Improvement- Has difficulty meeting performance expectations

1- Unsatisfactory- Does not meet performance expectations

**Section 1. Major Areas of Responsibilities from Job Description**

Using the Position Job Description, in the spaces below fill in the 4 “major responsibilities” of your job (usually these would be those requiring the largest % of effort). Reflect on your performance of those responsibilities using the checkboxes. You may add brief explanatory comments.

| **Major Responsibility (1):** |
| --- |
| **5-Outstanding** | **4-Very Good**  | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
| **Comments:**       |

| **Major Responsibility (2):** |
| --- |
| **5-Outstanding** | **4-Very Good**  | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
| **Comments:**       |

| **Major Responsibility (3):** |
| --- |
| **5-Outstanding** | **4-Very Good**  | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
| **Comments:**       |

| **Major Responsibility (4):** |
| --- |
| **5-Outstanding** | **4-Very Good**  | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |
| **Comments:**       |

**Section 1A. Annual Goals**

Use this section to suggest development goals. What new skills or competencies would you like to develop? What existing skills and competencies would you like to improve? It is highly recommended that goals be established which can be based on College, Division, Department or Professional Development goals. For each goal established, specify a comprehensive description of that goal in the chart below (row height will automatically adjust to text overflow) as well as a target date when work toward that goal will commence and a target date for goal completion. The status column can be used to track progress toward that goal.

|  |  |  |  |
| --- | --- | --- | --- |
| **Goal Description** | **Initiation Date** | **Completion Date** | **Goal Status** |
|       |       |       |       |
|       |       |       |       |
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**Section 2. Core Competencies**

**1. I strive for personal excellence at work.** Examples of how you might demonstrate this competency include: Committing to making the best of your talents at work by strengthening existing talents or developing new ones. Talents might include *interpersonal skills* such as listening, being a team player, cooperating, collaborating, etc., *business skills* like project management, customer service, making presentations, public speaking, etc. and *personal traits* like honesty, integrity, diligence, intentionality, etc..

 **To what extent do you do this?**

| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| --- | --- | --- | --- | --- |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**1a. Comments:**

**2. I assume responsibility for the tasks, processes and tools in my job.** Examples of how you might demonstrate this competency include: Committing to doing the best you can do on the job. Understanding your job and how it supports the College. Seeking improvement and efficiencies through the use of creativity and innovation.Being a good steward of College resources. Managing risks and reducing losses.

  **To what extent do you do this?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**2a. Comments:**

**3. My focus is on the needs of the people my work supports.** Examples of how you might demonstrate this competency include: Understanding & satisfying the needs of customers and clients. Finding ways to improve service. Being a highly effective communicator (both written and verbal communications).

 **To what extent does the employee do this?**

| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| --- | --- | --- | --- | --- |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**3a. Comments:**

**4. I engage with the values and mission of the College.** Examples of how you might demonstrate this competency include: Seeking to understand what differentiates Holy Cross from other workplaces. Understanding essential values, as expressed in the Holy Cross Mission Statement. Finding ways to engage with the College Community through programs and practice.

 **To what extent does the employee do this?**

| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| --- | --- | --- | --- | --- |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**4a. Comments:**

**COMPLETE THIS SECTION ONLY IF YOU SUPERVISE ONE OR MORE STAFF MEMBERS**

**Section 3. Supervisory Competencies**

**1. I take responsibility for employee development.** Examples of how you might demonstrate this competency include: Assuming responsibility for the development of the employees who report to you, helping them make the best of their talents and realize their full potential. Engaging employees, taking the time to understand their wishes and aspirations and objectively assessing their capabilities and weaknesses. Creating training and work experiences to help employees grow and develop. Not shying away from conversations that may be challenging and uncomfortable. Giving effective feedback.

 **To what extent do you do this?**

| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| --- | --- | --- | --- | --- |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**1a. Comments:**

**2. I engage in good supervisory practices to get the best from my employees.** Examples of how you might demonstrate this competency include: Understanding what motivates people to do their best (and the primacy of internal sources of motivation). Engaging regularly with employees to build rapport and trust. Setting clear expectations. Recognizing and rewarding good performance. Making decisions based on business reasons. Avoiding unfair treatment. Practicing “active listening” - asking questions to clarify understanding and intent and avoiding leaps to judgment. Giving individualized attention to employees and using encouragement, praise, direction and correction, as the situation requires. Understanding when to direct and when to coach. Using a coaching approach in supervision.

 **To what extent do you do this?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**2a. Comments:**

**3. I plan & organize work logistics so as to create conditions for success.** Examples of how you might demonstrate this competency include: Taking practical steps to remove obstacles that may hold back employees and arranging work so that the employee has the best chance to succeed. Obstacles may include things like physical working conditions, technology, tools, processes, and/or mindsets. Obstacles may not be in the employee’s direct control but in others whom the employee has to work with to get his or her job done, e.g. vendors, customers, suppliers, other Holy Cross departments, etc.

 **To what extent do you do this?**

| **5-Outstanding** | **4-Very Good** | **3-Good** | **2-Needs Improvement** | **1-Unsatisfactory** |
| --- | --- | --- | --- | --- |
| [ ]  | [ ]  | [ ]  | [ ]  | [ ]  |

**3a. Comments:**