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

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

**General Instructions:**

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

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

Using the Job Position 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 space below. You may add brief explanatory comments to each responsibility.

| **Major Responsibility (1):** |
| --- |
| **Comments:** |

| **Major Responsibility (2):** |
| --- |
| **Comments:** |

| **Major Responsibility (3):** |
| --- |
| **Comments:** |

| **Major Responsibility (4):** |
| --- |
| **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 for 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** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |

**Section 2. Core Competencies**

**Directions for Competencies**: In the sections below, review each competency based on your reflection of this past year’s performance and add specific comments to support your perspective. Use the methodology of the SMART information which is Specific, Measurable, Attained, Results with approximate Timeline of completion, where possible.

**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..

**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.

**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).

**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.

**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.

**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.

**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.

**3a. Comments:**