

# EXEMPT PERFORMANCE PLANNING & REVIEW

Employee:	Job Title:	Supervisor:
Department:	Annual Review Period - From:	To:

**EXEMPT ANNUAL PERFORMANCE PLANNING AND REVIEW PROCESS:**

<p><b>Step 1</b></p> <p><b>EMPLOYEE</b> Completes planning and review, self-reflecting on performance from the review period. Reference job description and previous year's performance goals.</p> <p><b>SUPERVISOR</b> Completes planning and review, reflecting on employee's performance from the review period. Reference employee's job description, goals, and any notes on the employee's performance made during the review period.</p>	<p><b>Step 2</b></p> <p><b>EMPLOYEE AND SUPERVISOR</b> Meet to discuss their reflections and their proposed goals for the coming year. Come to agreement on new goals for next review period.</p>	<p><b>Step 3</b></p> <p><b>SUPERVISOR</b> Completes a final draft of the review form based on the conversation from the meeting. Supervisor can ask employee to complete the draft.</p> <p><b>Step 4</b></p> <p><b>SUPERVISOR</b> Updates job description if applicable.</p>	<p><b>Step 5</b></p> <p><b>EMPLOYEE AND SUPERVISOR</b> Sign the form.</p> <p><b>Step 6</b></p> <p><b>ONE-UP SUPERVISOR</b> Signs the form.</p> <p><b>Step 7</b></p> <p><b>SUPERVISOR</b> Scans the form and sends to HR.</p>
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**RATING SCALE:**

- Exceptional:** Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of department or College objectives.
- Exceeds expectations:** Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent. Annual goals were met.
- Meets expectations:** Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good. The most critical annual goals were met.
- Improvement needed:** Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility, and/or the most critical goals were not met. An improvement plan must be attached and monitored to measure progress.
- Unsatisfactory:** Performance was consistently below expectations in most essential areas of responsibility, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one or more important areas. An improvement plan must be attached and monitored to measure progress.

**A. OVERALL RATING**

**ANNUAL PERIOD:**

Exceptional   
  Exceeds Expectations   
  Meets Expectations   
  Improvement Needed   
  Unsatisfactory

\*By checking Improvement Needed or Unsatisfactory, you must complete a Performance Plan for this employee.

**PROBATIONARY PERIOD: TO BE USED FOR AN EMPLOYEE FINISHING PROBATION**

Meets Expectations   
  Does Not Meet Expectations

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### B. TOP 3-5 GOALS FOR THIS REVIEW PERIOD (REFER TO PREVIOUS PERFORMANCE REVIEW, AS A STARTING POINT)

For each goal, also note which Strategic Direction, Strategic Priority, or Operational Goal it is most aligned with. Reference the Strategic Plan, the Institutional Accountability Plan and Report, and/or your department's Operational Plan.

**GOALS ARE DETERMINED AT THE START OF AND DURING THE REVIEW PERIOD.  
COMMENTS ARE ADDED AT THE END OF THE PERIOD.**

**MOST ALIGNED  
STRATEGIC DIRECTION,  
STRATEGIC PRIORITY, OR  
OPERATIONAL GOAL**

1. Goals & Comments	
2. Goals & Comments	
3. Goals & Comments	
4. Goals & Comments	
5. Goals & Comments	

### C. COMMENTS ON OVERALL PERFORMANCE

Comments are required either here or above to explain ratings above or below Meets Expectations. Describe specific behaviors that illustrate where performance needs improvement or exceeds expectations. Highlight opportunities for growth and development; note recognition received.

If there are issues to be addressed outside the comments in the Goals section above, they should be included here.

Comments:

### D. WHICH VALUE(S) DID THIS YEAR'S PERFORMANCE BEST SUPPORT?

To aid understanding, please refer to the Core Values and Behavioural Anchors Matrix.

Community    Access    Respect    Excellence

Comments:

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### E. CAREER ASPIRATIONS

What are your career aspirations for the next 3-5 years? What might be some next steps to help realize your career goals?

Comments:

### F. SIGNATURES

<b>Employee:</b> <i>My signature indicates I have received a copy of this review. (I have attached a response if I have any outstanding comments.)</i>	<b>Supervisor</b>	<b>One-Up Supervisor</b>
	<b>Name:</b>	<b>Name:</b>
	<b>Title:</b>	<b>Title:</b>
	<b>Signature:</b>	<b>Signature:</b>
	<b>Date:</b>	<b>Date:</b>

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**TOP 3-5 GOALS AND EXPECTATIONS FOR NEXT PERIOD:** (List goals here, and refer to the [Development Action Plan](#) for further planning.)

**MOST ALIGNED  
STRATEGIC DIRECTION,  
STRATEGIC PRIORITY, OR  
OPERATIONAL GOAL**

1.	
2.	
3.	
4.	
5.	

# HUMAN RESOURCES

Selkirk  College

NOTES: