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| X:\Photos\Xavier Logo - 2017.png | **ANNUAL PERFORMANCE REVIEW – ABBREVIATED FORM**    Name: Click here to enter text.  Title: Click here to enter text.  Division: Click here to enter text.  Department: Click here to enter text.  Supervisor: Click here to enter text.  Fiscal Year: Click here to enter text. |

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| **PERFORMANCE RATING SCALE** |
| **1 = Unsatisfactory**  Performance consistently falls below the acceptable standards. Significant improvement is needed. |
| **2 = Needs Improvement**  Performance sometimes meets the acceptable standards, but often does not. |
| **3 = Meets Expectations**  Performance regularly meets the acceptable standards set for the position and *may occasionally exceed the standards*. |
| **4 = Exceeds Expectations**  Performance regularly meets the acceptable standards and often exceeds the standards. |
| **5 = Exceptional**  Performance *consistently and significantly exceeds* the standards set for the position. Performance in this area *is clearly superior to almost all other employees.* |

**SECTION 1. INSTITUTIONAL VALUES**

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| **Magis** – focus on students; encourage and model personal accountability and high performance with the common good in mind; use resources efficiently and strategically; act with integrity  **Cura Personalis** – encourage balance in our professional and personal lives; build trust through ongoing feedback; recognize and utilize individual styles and skills; treat people with respect regardless of position  **Reflection** – be self-aware and understand strengths and weaknesses; encourage and model personal growth, evaluation and learning; challenge the process and status quo as appropriate; accept responsibility for our actions  **Discernment** – make important decisions with broad consultation; consider the full impact of our actions; manage conflict constructively | | **Solidarity & Kinship** – develop strong relationships within and outside of Xavier; value diversity of people, ideas and ways of thinking; motivate others and offer assistance with your talents  **Service Rooted in Justice and** Love – contribute service time in the way of treasure and talents with others; support those in need; help others become men and women for others  **Diversity and Inclusion –** embrace and respect people from all backgrounds; demonstrate equity and inclusion in executing duties and responsibilities; participate in diversity-related professional development courses, activities, and events; promote or assist in implementation of campus diversity initiatives | |
| **OVERALL RATING** | SUPERVISOR RATING | | EMPLOYEE RATING |
| Enter rating from 1 to 5 | Choose a rating | | Choose a rating |

**SECTION 2. CORE COMPETENCIES**

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| **Leadership** – creating a healthy work environment that encompasses developing or promoting a workplace climate conducive to productivity and self-motivation; trustworthy behavior, demonstrating through personal action that one is ethical and trustworthy; clearly articulating goals and objectives to colleagues and direct reports; results oriented; focusing work efforts on achieving positive results within one’s area of responsibility  **Managing Work** – effectively organizing and carrying out work processes to achieve individual and organizational goals through necessary means such as setting priorities and making appropriate decisions to complete assigned tasks while balancing urgency and importance; making decisions and analyzing data and information to make informed timely decisions and appropriately disseminating those decisions to others; and problem solving through balancing facts and people issues effectively to resolve problems and meet organizational concern  **Effecting Change** – developing and supporting processes that bring about positive change in support of University’s goals; empowering others with the ability to change processes that pose barriers to change; willing to accept challenges and modify processes and behaviors as needed; willing to take appropriate risks and make decisions based on incomplete or ambiguous information | | **Collaboration** – establishing and maintaining collegiality and cooperative working relationships with other members of the University; involving others by engaging colleagues, direct reports and other coworkers or stakeholders by sharing information (e.g. through reports, meetings, presentation or by other means based on job responsibility); coaching and supporting others in their skill building and by providing information, resources and tools to enable them to be successful; soliciting input and asking for ideas and/or feedback from others in appropriate settings such as meeting, phone calls and presentations  **Communicating** – using verbal and non-verbal communication and showing respectful behavior toward colleagues and others in the University; actively listening and focusing on the person speaking, asking questions and providing feedback to ensure understanding; teaching and sharing knowledge and information with others; promoting dialogue with others and uncovering and discussing concerns and objections. | |
| **OVERALL RATING** | SUPERVISOR RATING | | EMPLOYEE RATING |
| Enter rating from 1 to 5 | Choose a rating | | Choose a rating |

**SECTION 3. JOB RESPONSIBILITIES**

*In this section, the supervisor should document the employee’s job responsibilities for the review period. These should include the major responsibilities from the employee’s positon description and may occasionally include other responsibilities.*

***An important responsibility for supervisors is to continue to develop themselves as managers and leaders. Supervisors should take advantage of professional development opportunities for themselves and encourage their staff members to take advantage as well.***

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| **OVERALL RATING** | SUPERVISOR RATING | EMPLOYEE RATING |
| Enter rating from 1 to 5 | Choose a rating | Choose a rating |

**SECTION 4. GOALS**

*In the space below, the supervisor should document the employee’s goals for the review period and assign a rating evaluating the employee’s progress toward those goals. Goals should be linked to Department and/or University goals. Organization and individual goals should be agreed and documented as early in the review period as possible. Some modification during the period may be needed, as situations change and evolve.*

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| **OVERALL RATING** | SUPERVISOR RATING | EMPLOYEE RATING |
| Enter rating from 1 to 5 | Choose a rating | Choose a rating |

**SECTION 5. OVERALL PERFORMANCE RATING**

*Employees and supervisors should provide a summary of accomplishments and overall performance for the appraisal period. Details of how the employee animated and demonstrated the institutional values and core competencies should be included. Not every value or competency; needs to be addressed, but those where the employee’s performance was particularly strong as well as those where improvement is needed should be noted. Performance against job responsibilities and progress toward goals should also be documented.*

*A single performance rating, in line with the ratings from the previous sections, should be entered by the supervisor.*

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| Employee Comments: Click here to enter text. |
| Supervisor Comments: Click here to enter text. |

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| **OVERALL RATING** | SUPERVISOR RATING |
| Enter rating from 1 to 5 | Choose a rating |

Employee Signature\*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*Note: Your signature does not necessarily indicate agreement with the contents of this form, but is a confirmation that you have met with your immediate supervisor to discuss your performance.

***Establishing organization and individual goals for the coming fiscal year should begin as soon as possible after the completion of the annual review discussion. These goals should be documented in a separate document and then transferred to next year’s appraisal form. Some modification of the goals during the period may be needed as situations change and evolve.***