

Annual Review for Exempt Employees Instructions

The annual review and work plan is intended to be a collaborative effort between the supervisor and the employee to review the past year achievements and performance, to encourage communication, and to work together to establish goals and performance expectations for the next year. These goals should be discussed together and agreed upon between the supervisor(s) and the employee in the planning session. The process is identified below.

1. Review of Job Description (*Supervisor and employee*)

The supervisor and employee should review and update the job description using the standard format provided by the Office of Human Resources. Where no job description exists, one will need to be developed. Updated job descriptions are to be returned to the Office of Human Resources.

2. Summary of past year's activities and Goal Setting (*Employee*)

The supervisor will request the employee to summarize his/her past year's performance, identifying the highlights, challenges, and accomplishments and to list goals for the coming year. The number of goals will vary for every employee depending on the scope and amount of work involved in each goal. Accomplishment of prior year's goals should be included in the employee's summary, where applicable. The length of the summary will vary, but we imagine that for most people, one to two pages should be sufficient.

3. Performance/Planning Meeting (*Supervisor and Employee*)

After the supervisor has reviewed the employee's written summary and goals, he/she should schedule a meeting with the employee. During this meeting, the supervisor and the employee will discuss the employee's evaluation, as well as the supervisor's overall evaluation and assessment of the past year. The supervisor can also provide the employee with a written review of the employee's performance during this meeting. If there are performance issues, the supervisor should identify very specific expectations to improve performance. If necessary, a specified time period to improve can also be specified.

The supervisor will also identify goals and collaborate with the employee during the performance/planning meeting to agree on specific goals for the coming year.

4. Summary of Review and Work Plan (*Supervisor*)

Following the planning session, the supervisor will provide the employee with a written summary of the employee's performance over the past year (if not already provided in the performance meeting). This summary should include expectations and goals agreed upon in the planning meeting. The employee should be informed that he or she can write a response to the evaluation and include it as an attachment to the supervisor's written review and work plan.

5. On-going Communication (*Supervisor*)

In order for the annual review and work plan to be successful, its intent is to be a developmental tool to encourage regular, ongoing communication regarding individual and department goals. Inform employee that on-going communication will occur throughout the next review period to review employee's progress on achievement of goals and expectations.

7. Follow-up (*Supervisor*)

A copy of the updated job description and the completed performance review (both the employee's summary and the supervisor's summary) are to be submitted to the Office of Human Resources and the respective AEC member. The review should be signed by both the employee and the supervisor.