

## Annual Employee Review (Staff) — Spring Cycle

March 1, 2026 — February 28, 2027

Review Date: \_\_\_\_\_

The completion of this form is a **required** step in the annual staff performance evaluation process. Supervisors should evaluate employee performance during the designated review period by providing ratings and comments across key performance areas, including job performance, professional competencies, collaboration, and goal achievement.

The completed evaluation should be shared with and discussed with the employee during the annual performance review meeting.

Please note that **employees are also required to submit a self-evaluation**. Supervisors and employees should exchange completed evaluations at least two (2) days prior to the scheduled performance review meeting.

### Section 1: Personnel Information

#### Employee & Supervisor Information

|                  |                                 |                                     |
|------------------|---------------------------------|-------------------------------------|
| Employee Name:   | Employee Title:                 | Department:                         |
|                  |                                 |                                     |
| Employee Status: | <input type="checkbox"/> Exempt | <input type="checkbox"/> Non-Exempt |
| Supervisor Name: | Supervisor Title:               |                                     |
|                  |                                 |                                     |

### Section 2: Employee Objectives

#### Rating Scale:

**5 - Exceeds Expectations:** Work is exceptional; goes far beyond standard requirements

**4 - Above Expectations:** Work is better than average; surpasses standard requirements

**3 - Meets Expectations:** Work meets the standard; reliable and competent

**2 - Needs Improvement:** Work is below standard but improving; needs support

**1 - Unsatisfactory:** Work is inadequate; fails to meet required standards

**N/A:** Not applicable or not observed

**Supervisors may only select one (1) rating per criteria.**

## Previously Set Objectives

| Objective                                                       |  | 5 - Exceeds Expectations | 4 - Above Expectations   | 3 - Meets Expectations   | 2 - Needs Improvement    | 1 - Unsatisfactory       | N/A                      |
|-----------------------------------------------------------------|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Objective #1:                                                   |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Objective #2:                                                   |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Objective #3:                                                   |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Objective #4:                                                   |  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Please provide feedback on the above ratings. <i>(Required)</i> |  |                          |                          |                          |                          |                          |                          |
| Total Score for Objectives:                                     |  |                          |                          |                          |                          | / 20                     |                          |

## Section 3: Performance Evaluation

### *Rating Scale:*

**5 - Exceeds Expectations:** Work is exceptional; goes far beyond standard requirements

**4 - Above Expectations:** Work is better than average; surpasses standard requirements

**3 - Meets Expectations:** Work meets the standard; reliable and competent

**2 - Needs Improvement:** Work is below standard; needs direction and training

**1 - Unsatisfactory:** Work is inadequate; fails to meet required standards

**N/A:** Not applicable or not observed

*Supervisors may only select one (1) rating per criteria.*

## Job Performance & Results

| Criteria                                                                                                                                                                     | 5 - Exceeds Expectations | 4 - Above Expectations   | 3 - Meets Expectations   | 2 - Needs Improvement    | 1 - Unsatisfactory       | N/A                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Dependability:</b> Fulfills responsibilities and commitments; can be relied upon to carry out assignments and meeting deadlines. Punctual and regular attendance at work. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Job Knowledge:</b> Understands job objectives, duties, and responsibilities. Demonstrates technical knowledge, job understanding, and problem-solving skills.             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Safety &amp; Security:</b> Follows all safety rules and completes work in a secure and safe way.                                                                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Please provide feedback on the above ratings. (Required)</b>                                                                                                              |                          |                          |                          |                          |                          |                          |
| <b>Total Score for Job Performance &amp; Results:</b>                                                                                                                        |                          |                          |                          |                          | / 15                     |                          |

## Professional Skills & Initiative

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|                                                                                                                                                                                                                                             |                          |                          |                          |                          |                          |                          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Adaptability &amp; Agility:</b> Demonstrates ability to adjust to changing job requirements; is open to new approaches; seeks or is willing to take on new responsibilities                                                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Professional Development:</b> Attends workshops, seminars, and related programs that provide career/professional development, enrolls in formal degree/certificate programs, presents at conferences, and/or provides training to others | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Please provide feedback on the above ratings. <i>(Required)</i></b>                                                                                                                                                                      |                          |                          |                          |                          |                          |                          |
| <b>Total Score for Professional Skills &amp; Initiative:</b>                                                                                                                                                                                |                          |                          |                          |                          | / 35                     |                          |

### Collaboration & Workplace Conduct

| Criteria                                                                                                                                                       | 5 - Exceeds Expectations | 4 - Above Expectations   | 3 - Meets Expectations   | 2 - Needs Improvement    | 1 - Unsatisfactory       | N/A                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Communication:</b> Clear, concise, and courteous verbal and written communications, presentation skills, and listening skills. Responds in a timely manner. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Teamwork:</b> Coordinates and cooperates with others in developing and executing plans.                                                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Conflict Resolution:</b> Takes initiatives to address situations involving conflict and appropriately resolves differences with little disruption.          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Civility:</b> Maintains positive internal and external working relationships and demonstrates respect towards coworkers.                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Please provide feedback on the above ratings. <i>(Required)</i></b>                                                                                         |                          |                          |                          |                          |                          |                          |
| <b>Total Score for Collaboration &amp; Workplace Conduct:</b>                                                                                                  |                          |                          |                          |                          | / 20                     |                          |

### Total Performance Rating

| <b>Criteria Totals</b><br><br><i>Please add the totals for each criteria and rating category.</i> | Exceeds Expectations | Above Expectations | Meets Expectations | Needs Improvement | Unsatisfactory | N/A |
|---------------------------------------------------------------------------------------------------|----------------------|--------------------|--------------------|-------------------|----------------|-----|
|                                                                                                   |                      |                    |                    |                   |                |     |

|                                                  |  |  |  |  |  |      |
|--------------------------------------------------|--|--|--|--|--|------|
| Job Performance & Results                        |  |  |  |  |  |      |
| Professional Skills & Initiative                 |  |  |  |  |  |      |
| Collaboration & Workplace Conduct                |  |  |  |  |  |      |
| <b>Total Score for All Criteria:</b>             |  |  |  |  |  | / 70 |
| Please identify strong areas/what is going well. |  |  |  |  |  |      |
| Please identify areas for improvement or focus.  |  |  |  |  |  |      |

## Section 4: New Employee Objectives

### New Objectives

| Objective     | Due Date | Metric |
|---------------|----------|--------|
| Objective #1: |          |        |
| Objective #2: |          |        |
| Objective #3: |          |        |
| Objective #4: |          |        |

## Section 4: Signatures

**All signatures below are required.**

|                        |                                                                                                                                                                              |      |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| Direct Supervisor Name | Direct Supervisor Signature                                                                                                                                                  | Date |
|                        |                                                                                                                                                                              |      |
| Department Head Name   | Department Head Signature                                                                                                                                                    | Date |
|                        |                                                                                                                                                                              |      |
| Vice President Name    | Vice President Signature                                                                                                                                                     | Date |
|                        |                                                                                                                                                                              |      |
| Human Resources Name   | Human Resources Signature                                                                                                                                                    | Date |
|                        |                                                                                                                                                                              |      |
| Employee Name          | <b>Employee Signature</b><br><i>My signature indicates that my supervisor has discussed this review with me; it does not necessarily imply that I agree with the review.</i> | Date |
|                        |                                                                                                                                                                              |      |