CASE WESTERN RESERVE UNIVERSITY — EST. 1826

ANNUAL PERFORMANCE EVALUATION REVIEW

Employee Name:	Employee ID #:	Supervisor:
Department:	Job Title:	**Evaluation Period** From: To:

Please review the Instructions and Matrix for guidance. Supervisors are also encouraged to review the Performance Review Policy and FAQs.

E = Exceptional   HE = Highly Effective   S = Successful   NI = Needs Improvement   U = Unsatisfactory

Competencies and Core Job Functions	Supervisor Comments	Supervisor Rating
Knowledge of job (*demonstrates appropriate understanding of job duties; develops skills needed to perform job effectively; understands expectations of the job and prioritizes assignments and core job functions*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Technical skills (*demonstrates appropriate knowledge of equipment, software, and relevant programs needed to perform job; stays abreast of developments in area of expertise*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Quality of work (*completes core job functions and assignments in an accurate, thorough, and effective manner that achieves expected outcomes*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Productivity/quantity of work (*completes core job functions and assignments in a timely manner and meets deadlines; uses work time productively; produces appropriate volume of work; effective time management and handling multiple tasks; follows through with assignments*)		☐ E ☐ HE ☐ S ☐ NI ☐ U

Initiative and commitment (*identifies and analyzes problems; offers solutions and/or suggests/implements improved methods; voluntarily assists department or colleagues; demonstrates personal responsibility when performing duties*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Work ethic (*demonstrates reliability, honesty, and integrity; disciplined and engaged in core job duties; demonstrates preparedness and punctuality at meetings*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Professionalism and interpersonal behavior (*exercises courtesy, empathy, and respect in communications and interactions with colleagues, supervisors, stakeholders, and/or customers; responds productively to constructive criticism; interacts well with customers and vendors; team player; maintains collaborative work relationship with colleagues; positive and professional demeanor (verbal and nonverbal); uses discretion*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Attendance and punctuality (*adheres to attendance policy - has 6 or fewer occurrences over a six-month period, excluding FMLA absences*)	*Dates of absences:* *Dates of tardies:*	☐ S ☐ U
Safety, security, and compliance (*complies with university policies; observes safety standards in the workplace; monitors, reports, and participates, as appropriate, in resolving potential safety and security issues; maintains data integrity with [U]Tech policies; attends required EHS annual lab safety training as applicable; completes annual compliance training); other activities may include attending university-wide safety training (e.g. RAD, ALICE, safety videos, etc.)*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Diversity and inclusiveness (*demonstrates and fosters civility, free exchange of ideas, and appreciation for distinct perspectives and talents of each individual; encourages relationships and interactions among people of diverse backgrounds; actively diminishes prejudice and discrimination; complies with the university's core*)		☐ E ☐ HE ☐ S ☐ NI ☐ U

Competency		Rating
values, diversity statement, and non-discrimination policy)		
Service orientation (*responds in a timely manner to internal and external requests; effectively addresses needs of customers with efficiency, courtesy, and good judgment; proactive; adheres to department service standards*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
	The sections below are for employees who supervise other employees	
Establishing direction and focus (*develops, explains, and discusses objectives that support department and university goals; offers assistance to support the goals and objectives of the department*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Developing staff (*supports career development opportunities for staff; provides suggestions and opportunities for staff training and development as appropriate*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Managing performance (*provides employees with clear expectations regarding job expectations and goals; holds self and staff accountable; clear, honest, timely, and regular performance feedback; completes the Annual Review in a timely and effective manner*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Empowering others (*develops employees' ability to be successful by sharing information and empowering employees to take initiative on how objectives will be achieved and issues resolved; motivates staff to achieve their potential; delegates appropriate responsibility*)		☐ E ☐ HE ☐ S ☐ NI ☐ U
Overall rating (*If competencies are not equally weighted, identify the most important and explain rationale; the relative importance of each competency may vary by position*)		☐ E ☐ HE ☐ S ☐ NI

	☐ U

Additional comments (i.e. areas where the employee excels or where improvement is necessary): _____

_____

Review of Past Goal(s) and Outcomes – Employee and Supervisor should complete in collaboration with each other during the Annual Review Meeting. Additional lines can be added to all goals or areas for development as needed. (*Note if any goals were changed due to a shift in priority*)

Previous year's goal(s)	Outcomes

Job-Related Goal(s) for Coming Year – Employee and Supervisor determine in collaboration with each other during the Annual Review Meeting.

Coming year's goal(s)	Descriptions and Measures

Professional Development Plan – Employee and Supervisor should complete in collaboration with each other during the Annual Review Meeting. Refer to the Individual Career Development Plan Template for guidance.

Areas for Development	Describe Development Activities

The Supervisor and Employee have discussed this performance review.
The Employee understands signing this performance review does not indicate that they agree with all of the information in it.
Signing the performance review is an expectation indicating receipt, and does not forfeit the employee's right to file a rebuttal.

_____	_____
Employee Signature Date	Supervisor Signature Date
(*Signature acknowledges receipt only*)	