|  |  |  |  |
| --- | --- | --- | --- |
| **Name and title** |  | **Evaluation period:** | **[Start date] – [End date]** |

# GOALS, OBJECTIVES, SELECTED ACCOMPLISHMENTS DURING THIS EVALUATION PERIOD

1.

# OTHER ACHIEVEMENTS, ACCOMPLISHMENTS, AND RESPONSIBILITIES (list 3-5 highlights)

* [Achievements, accomplishments, and responsibilities]
* [Achievements, accomplishments, and responsibilities]
* [Achievements, accomplishments, and responsibilities]

# CHALLENGES FACED THIS PERIOD

*
*

# PROFESSIONAL DEVELOPMENT/TRAINING RECEIVED

*
*

# committee PARTICIPATION AND LEADERSHIP

*
*

# Publications and PRESENTATIONS (AS APPLICABLE)

*
*

# GOALS AND OBJECTIVES FOR NEXT EVALUATION PERIOD

1.

2.

3.

# evaluation (completed by NCRA Chair, with input from NCRA members)

*
*

# STRENGTHS AND AREAS FOR DEVELOPMENT

# Suggested Career Progression Plan/PROFESSIONAL DEVELOPMENT

# ADDITIONAL COMMENTS, AS NEEDED

**ANNUAL PERFORMANCE RATING** (OUTSTANDING, EXCEEDS EXPECTATIONS, MEETS EXPECTATIONS, OR DOES NOT MEET EXPECTATIONS)**:**

# ed/ad and NCRA Chair signatures

|  |  |  |  |
| --- | --- | --- | --- |
| Signature (ED/AD) |  | Signature (NCRA Chair) |  |
| Name | [Employee name] | Name |   |
| Date | [End date] | Date | [End date] |

**Rating Metrics Guide:**

* Outstanding—truly going “above and beyond” what is expected in a typical year, including important/demonstrated impacts for the organization.
* Exceeds—similar to “meets” but includes one or two additional efforts/projects/initiatives that go beyond what is typically expected for the position.
* Meets—doing everything expected for the position description, quality work (it is not a bad rating
* Does Not Meet—self-explanatory— did not fulfill the expectations for the position.

**PERFORMANCE TIMELINE**

* Calendar year evaluation of performance (January 1 to December 31).
* ED/AD will draft and provide their Annual Performance reports to the EC no later than December 15th.
* Performance Review meetings to be conducted in January.
* Final Performance review and rating due to host Universities no later than mid-February.

**SUGGESTED FLOW FOR ANNUAL EVALUATION MEETING:**

1. Step 1, Call #1 with ED/AD and full NCRA membership (scheduled by NCRA chair with assistance from AD):
* 15 minutes each for ED and AD to highlight:
	+ Previous year’s activities and accomplishments of note.
	+ Review past year’s goals, which were met, which were not and why.
	+ Challenges faced and how these were handled/what could have been done better, if applicable.
	+ Goals for the next year and path forward.
* ED and AD log off for NCRA directors’ discussion time.
* NCRA EC, as led by NCRA chair, prepares the formal performance review for ED and AD.
1. Step 2, Call #2 with NCRA EC and ED/AD (scheduled by NCRA Chair with assistance from AD):
* NCRA chair presents final performance review to ED and AD.
* Discussion on what’s working, what’s not.
* Suggested changes to goals and path forward.
1. Following Call #2, the NCRA Chair prepares and shares the final written performance reviews for the ED and AD. The ED and AD then share these with their host institutions to meet local review obligations. This final review should also include any pay adjustments, as applicable.
2. Midterm review point in July, either at the NCRA Summer Business Meeting or monthly call, ED and AD spend about 10 minutes giving a brief update on the first six months of the calendar year.