



Performance Appraisal Process

Company XYZ believes in providing regular feedback and training to support career development. If employees understand how their job aligns with Company goals, they will be able to contribute to the success of the organization and the whole team wins.

1. Employees are assigned goals and performance objectives specific to their job. The goals and performance objectives link to the Job Description and define the expectations – quantitative and/or qualitative standards of a job's activities.
2. Collaboration between the Employee and the Supervisor is essential in goal planning and ongoing employee development. Employees are expected to participate in goal setting and performance planning with their Supervisor.
3. Regular informal feedback and performance conversations will be provided in an effort to build constructive and productive working relationships. At a minimum, a goal-setting meeting will be held quarterly. Employees are encouraged to discuss their personal career goals with their Supervisor and integrate those in the goal-setting process.
4. A Probationary Performance Review will be completed for all new employees at, or just prior to, the 90-day mark by their Supervisors.
5. A formal performance appraisal and meeting will take place _____ (annually, bi-annually)
6. Employees will be provided the opportunity to complete a self-assessment on their performance annually, prior to the formal performance appraisal meeting with their Supervisor.

Procedure

1. A performance appraisal meeting will be scheduled for the Employee by his/her Supervisor.
2. Using the instructions below, employees complete a self-review using the Performance Appraisal Form and return it to their Supervisor by the due date.
 - Section A – Complete
 - Section B – Leave blank but employees should begin noting their ideas for SMART Goals and be prepared to discuss goal setting for the following quarter/year, with the Supervisor, at the performance appraisal meeting.
 - Section C – Complete
 - Section D - Complete
3. The Supervisor completes a review on each employee using the Performance Appraisal Form (completes Sections A & C) in preparation for the performance appraisal meeting. The supervisor will also prepare to have a discussion on SMART Goals at the meeting.

4. At the performance appraisal meeting, the employee and supervisor will discuss their individual assessments: the employee will present the assessment of him/herself and the supervisor will present his/her assessment of the employee.
5. At this meeting, both parties present their ideas for SMART Goals (Section B) and decide on a 3 - 5 goals for the following quarter* or year. These agreed-upon SMART Goals will be inserted into the final copy of the Performance Appraisal Form and will be evaluated at the next quarterly planning meeting or performance review.

*If the goals are to be achieved on a quarterly basis, then the goal-setting process needs to be completed on a quarterly basis to set goals for the following quarter. This can be done at the quarterly planning meeting.

6. At this meeting, the employee will also discuss his/her personal career development goals in Section D with the supervisor. The agreed-upon goals will be included in the final Performance Appraisal Form.
7. After the meeting, the supervisor will finalize the Performance Appraisal Form and forward it to the employee for review and signature.
8. The employee is then invited to add any comments to the Form in Section E and return the Form to the supervisor.
9. After the supervisor receives the signed Form from the employee, the supervisor will also sign the Form and it will be considered final.
10. A copy of the final signed version of the Performance Appraisal Form will be shared with the employee and kept in the employee file.