**Performance Management Process Guide**

Managers and staff members should meet consistently throughout the year to reflect on the manager/staff relationship, realign expectations, and discuss overall performance. **This template is intended for the following uses: 1) managers to assess staff, and 2) staff members to self-evaluate and share feedback with their manager.** Page 1 offers background information for managers, and page 2 is to be shared with staff members and managers. Adapt this resource as needed to insert all of the goals, team or organizational values, and core competencies for which you have set expectations. You may also outline the timeline for your process (including key deadlines).

## *Note to Managers*

Here are a few other things to keep in mind before you get started:

* **Preparation:** During the feedback and evaluation process, both the manager and the staff member take time to reflect before meeting for a discussion. Managers may review staff work products, role expectations, and the results they achieved toward annual objectives. The manager should ensure these goals and expected results are clear at the start of the year and aligned with organizational goals.
* **Summarize, without Surprise:** These formal conversations should reflect and build on the feedback you provided at regular check-ins throughout the year. The performance review is not the time for surprises.
* **Center on Alignment and Growth**: The purpose of these conversations over the year is to align on performance, growth, and development, not to simply share all the things the staff member could improve upon. While this may be a part of the process, a strong performance management conversation aligns on goals, celebrates successes, and identifies growth opportunities.

# Performance Evaluation Overview

# **Our performance evaluation system consists of four main sections:**

1. **What was achieved?** Staff members will reflect on their goals (both qualitative and quantitative, if applicable.
2. **How was it achieved?** Staff members reflect on what knowledge, skills, and orientation contributed to both progress and areas for growth.
3. **What’s next?** Manager and direct report alignment on strengths, areas for growth, and begin to draft a development plan.
4. **What type of feedback is sent to the manager?** Staff members reflect on what the manager did well to support staff success and identify opportunities for increased development.

*Ratings*

* **Exceeds expectations**: Consistently delivers exceptional results; is a model for others to follow
* **Meets expectations**: Consistently meets expectations in all areas
* **Partially meets expectations**: Meets expectations in some areas and needs improvement in others
* **Does not meet expectations**: Needs significant improvement quickly

| **Timeline** | | |
| --- | --- | --- |
| **Activity** | **Date** | **Notes** |
| **Self-Evaluation.** Staff member completes self-evaluation |  | 48 hours prior to conversation; self-evaluation is shared with manager |
| **Manager Feedback.** Manager reviews goals and results achieved, and drafts evaluation |  |  |
| **Employee Review.** Manager sends draft feedback/evaluation to staff member |  | 24 hours prior to conversation; manager shares feedback with direct report |
| **Alignment Conversation**. Manager and staff meet to discuss evaluation |  |  |
| **Finalizing Evaluation.** Revisions/additions made (if needed), next steps confirmed, and evaluation complete |  |  |

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