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Purpose

The purpose of the performance review is to create opportunity for an open, two-way conversation between you and your manager about your experience as an employee at **the Company**, your job performance and areas of excellence, areas for development, and to mutually agree on goals and professional development for the coming period.

Getting Started

- ◆ Open the MASTER TEMPLATE – Performance Review Form and save a copy with the following file name convention: Doe_Jane_Performance_Review_2024_01_24.
- ◆ Double-click on the top of the page header to open it. Replace the **<Employee Name>** placeholder with your name and enter the review period dates. In most cases, these span the previous year, for example, 01-Apr-14 to 31-Mar-15.
- ◆ Complete the form electronically, not on paper.

In general:

- ◆ Complete all the **Employee** fields in all sections of the form.
- ◆ When adding comments and examples, be specific.
- ◆ Ensure you have a copy of your job description for reference to complete many of the required fields. The job description describes the duties and responsibilities associated with a position, and the success factors and qualifications required for executing on those responsibilities.
- ◆ The Performance Review Form includes up to 2 input tables per section. Copy and paste additional tables in each section as needed.

Rating Scales

There are a number of rating opportunities throughout the form. In all cases, a rating scale of 1 to 5 is used for each rating, with 1 being the highest rating.

Rate yourself in each category, and your manager will do the same. If you and your manager disagree on ratings, you have the opportunity to discuss this during your review meeting.

The tables below describe what each rating represents for the different categories rated.

GOALS ACHIEVED

Ratings	
1 Goal Achieved	Project delivered, success achieved, and all milestones reached. Overall, goal was executed in an exceptional manner.
2 Goal Still in Progress	Some components of the goal are still in progress. Some delays were due to circumstances completely beyond the control of the employee. Some delays were in the control of the individual. Overall, goal was executed in a satisfactory manner.
3 Goal Deferred	Goal was deferred by management. (Provide reason for deferral in Comments section.)
4 Goal Not Met	Goal was not met even though success factors were within the control of the employee.
5 NA / No Basis for Appraisal	No basis for appraisal of this goal. (Provide explanation in Comments section.)

JOB-SPECIFIC SKILLS

Ratings	
1 Expert	Adds continuous value to the position and the department with advanced knowledge and expertise in this area. Demonstrates expertise when dealing with uncharted territory for the position. As a subject matter expert, may be provided with teaching or mentoring opportunities within the Company.
2 Competent	Demonstrates full competency in this area. Can perform this activity at expected performance levels without supervision and at an appropriate pace. Understands and applies theory, experience gained, and best practices.
3 On track to Competence	Expected to be competent within the next 6 months with additional exposure and experience in the position.
4 Development Required	Unable to perform this activity at the level needed to execute on job requirements. Development is required.
5 NA / No Basis for Appraisal	No basis for appraisal of this skill. (Provide explanation in Comments section.)

SUCCESS TRAITS & MANAGEMENT COMPETENCIES

Ratings	
1 Exemplary	This competency is observed consistently. People who come in contact with the individual would observe excellence in this area.
2 Usually Observed	This competency is usually observed. Thank you. Continue to focus on it so that it is observed consistently.
3 Sometimes Observed	The competency is observed occasionally. This area is a development opportunity for the individual.
4 Seldom Observed	Immediate development required.
5 NA / No Basis for Appraisal	No basis for appraisal. (Provide explanation in Comments section.)

OVERALL PERFORMANCE RATING

Ratings	
1 Consistently Exceeds Expectations	Overall, the individual meets all expectations of the job and consistently exceeds expectations of the position in important areas that make a difference to the department or overall the Company success. The individual often executes on activities outside of normal job duties. Is often extra-resourceful, innovative, and drives innovation and improvement. The individual is recognized as someone who often makes a difference and raises the performance bar for themselves and others. Known as a leader or change agent.
2 Consistently Meets Expectations	The individual is competent in their position, consistently delivers expected results, consistently meets expectations of the job, and may at times exceed expectations.
3 Meets Most Expectations	While competent in most areas, the individual requires development in some areas.
4 Is Not Meeting Expectations	The individual is not meeting expectations of the job and a Performance Improvement Plan is required.

Ratings	
5 Rating Not Applicable	Manager to provide explanation in comments.

While each team may have their own particulars for what warrants a '1' rating, the following are some general examples of achieving a rating of '1':

- ◆ Often goes above and beyond the call of duty (not just putting in overtime to complete tasks, but putting in extra effort that translates into results that may or may not be part of the job description).
- ◆ Often over-delivers on project commitments or delivers under challenging circumstances.
- ◆ Often takes initiative to set stretch goals and take on additional responsibilities outside job scope.
- ◆ Often makes an effort to be well-networked or well-read and leverages this knowledge to infuse new ideas into the Company.
- ◆ Continuously strives for self-improvement.
- ◆ Peers, leaders, internal and external stakeholders and the community are often recognizing the individual for exceeding expectations.

Completing the Form

Overview

Complete the fields in the Overview table. If you're unsure what to put in a field, leave it blank.

My Experience & Satisfaction

Using the drop-down menu, rate your employment experience with the Company.

Reviewing the Previous Period

You and your manager rate and comment on goal achievement, other accomplishments, and general areas of excellence.

GOAL ACHIEVEMENT

1. Copy and paste the goals listed in your last performance review form into this year's form. If no goals were set for the last review period, select the **Section not applicable** check box.

2. For each goal that was set:
 - a. Rate yourself using the scale in *Performance Rating Scales*, above.
 - b. Provide comments and/or examples where appropriate, but particularly for 1 or 4 ratings. Include strengths and opportunities for development, if applicable.

OTHER ACCOMPLISHMENTS

1. List any additional major accomplishments, commitments, or projects, particularly if:
 - Goals weren't identified in the last review period.
 - One or more of the goals from the last review period became no longer applicable due to changing priorities throughout the year.
 - You were involved in a project or initiative that was not identified as a goal.
 - You were involved in volunteering or planning events to make our community or work environment a better place.

If none of the above applies, select the **Section not applicable** check box.

AREAS OF EXCELLENCE

It's always good to remember what you're good at. List 1-3 areas where you really excel in your job. Your manager will comment on them, too.

AREAS FOR DEVELOPMENT IDENTIFIED IN LAST REVIEW PERIOD

1. Copy and paste the areas for development identified in your last performance review form into this year's form. If no areas of development were identified in the last review period, select the **Section not applicable** check box.
2. For each area of development listed:
 - a. Summarize the action taken over the past year.
 - b. Provide comments and/or examples where appropriate.

TECHNICAL TRAINING & LEARNING

List any learning activities you engaged in last year. These may include formal learning such as courses or workshops, and informal learning such as reading relevant books or participating in online webinars.

If you didn't engage in any job-related learning activities last year, select the **Section not applicable** check box.

Position Competencies

JOB-SPECIFIC SKILLS

1. Refer to your job description to list the job-specific skills required for your position. Copy and paste additional cells to accommodate all job-specific skills.

2. Rate each skill using the scale in *Performance Rating Scales*, above.

POSITION SUCCESS TRAITS

Same instructions as Job-Specific Skills

MANAGEMENT/LEADERSHIP COMPETENCIES (MANAGERS ONLY)

Complete this section only if you are a manager with direct reports. Same instructions as Job-Specific Skills

Planning for next Review Period

This entire section will be completed by your manager. You don't have to do anything for this section in advance, unless you want to pre-populate it with your own suggestions for goals, personal development and learning for next year.

GOALS

List and describe at least 3 high-level goals/objectives to be achieved by the end of the next review period. Make sure they are SMART goals—Specific, Measurable, Attainable, Relevant, Timely.

AREAS FOR DEVELOPMENT

List up to 2 competencies you'd like to develop during the upcoming review period, and how.

TECHNICAL TRAINING & LEARNING PLAN

List 2 or 3 learning/training initiatives you'd like to undertake in the next review period. This may be as basic as reading a book on a particular subject matter or as extensive as participating in a long-term training initiative – subject to budget, return on investment, and eligibility. Signing a Training Reimbursement Agreement may be required depending on the circumstances & cost of participation.

Summary Rating & Sign Off


OVERALL PERFORMANCE RATING FOR THE REVIEW PERIOD

Your manager will assign a summary rating and discuss it with you during the performance review meeting.

SIGN OFF

After the meeting, and once the form is finalized, you'll both sign the form and provide comments, if desired.

Working with the Document & Microsoft Word®

- ◆ Gray shaded form fields are input placeholders. To replace the text in these form fields, click **ONCE** on the field and type your new content. You will not be replacing text if you click twice. Click the gray field only once.
- ◆ To insert a check inside a check box, double-click on the check box and under the **Default value** heading, select **Checked**.
- ◆ To choose a rating from the “choose an item” field, click the text and click on the arrow to display the options. Click on your chosen rating.
- ◆ Table cells will expand to accommodate any length of text.
- ◆ If required, you can copy and paste to add additional tables to the form. In the upper-left corner of the table, click the  **move handle** to select the entire table, and then press **Ctrl + C** to copy it. Right-click in the destination location and press **Ctrl + V** (or right-click and select **Keep Original Table Formatting** from the **Paste Options**).
- ◆ If required, you can copy and paste to add additional rows to the tables. Place the cursor in a row, right-click, and select **Insert > Insert Rows Below**. Or, to copy and paste a row, select the entire row and press **Ctrl + C**, then place cursor in the first cell of the destination row and press **Ctrl + V**.

Why Performance Reviews Are Important

We believe you should be given meaningful feedback on your performance in your job that allows you to maximize job satisfaction, while satisfying the requirements of the position. That’s why it’s the responsibility of managers to support the career path goals of their employees, while supporting the overall goals of **the Company**.

The performance reviews process allows us to regularly evaluate general performance and measure progress toward specific goals. It acknowledges your work, addresses areas that may be improved, and identifies professional development and training opportunities that will further support your growth and add value to your position.

The Performance Review Form also provides a section for you to tell us how satisfied you are in your position to help us understand your experience and provide support.

While an annual performance review ensures a formal dialogue between manager and employee at least once a year, you and your manager are encouraged to provide ongoing, real-time feedback year-round.

The Process

Regular, full- and part-time employees and managers work together to prepare a formal evaluation of the employee’s performance once a year, typically before **March 31**, or 3 months after our year end.

The general process:

1. Employee completes the form and sends to their manager by the communicated deadline.
2. Manager reviews the completed form and adds ratings and comments. and complete their sections of the form. They are responsible for:
 - Managing and reviewing employee performance.
 - Setting performance objectives.
 - Determining final performance summary ratings.
3. Manager and employee meet to discuss and sign the completed form.
4. Final completed form is reviewed by your manager's manager.
5. A copy is filed in your employee file.

Note: Temporary or term employees, contractors, and consultants do not participate in the annual performance review process.

If you require technical assistance with the form or require assistance or advice on providing or receiving feedback, contact the **Title of Individual**.

Performance Review Meetings

Once you and your manager have both completed your sections of the Performance Review Form, your manager will schedule a meeting with you to discuss it.

This is a great opportunity to have a frank discussion with your manager about your experience, performance in the position, opportunities for growth, and your career goals. The meeting will go something like this:

1. Review the previous performance period, with a focus on areas where your ratings differ from those of your manager.
2. Discuss and finalize the next period's goals and activities.
3. If changes need to be made to the form as a result of the meeting, your manager will make them.
4. Your manager will assign a final summary rating in the last section and you'll both sign off on the form. If you and your manager have a difference of opinion on anything, there's room for you to add brief comments or attach longer ones.