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

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

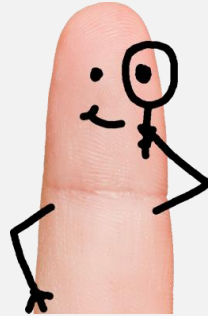
The Process

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 CUSTOMIZER: Example: March 31, or 3 months after our year end.

The general process:

1. Employee completes the form and sends to 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 the completed form and finalize its content.
4. Final completed form is reviewed by CUSTOMIZER: Example: your manager's supervisor and HR.
5. CUSTOMIZER: Describe how performance review results will be used once completed. For example to calculate incentive or bonus pay. Or insert the next bullet only. Or delete bullet(s).

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



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- E. **Summary Rating & Sign Off:** Your manager assigns an overall performance rating for the review period and you both sign off on the review. You can add comments if desired.

In general:

- ◆ Complete all the **Employee** fields in all sections of the form.
- ◆ When adding comments and examples, be specific.
- ◆ You may find it useful to refer to the *JE-ALL-3530-M. Job Description Form* for your position. This form describes the duties and responsibilities associated with a position, and the success factors and qualifications required for executing on those responsibilities. If you do not have a job description for your position, contact CUSTOMIZER: Insert Contact's title, not name.
- ◆ The form comes set up with 2, 3 or 4 input tables per section (e.g., 3 goals, 2 other accomplishments, etc.). This doesn't mean you have to stick to that number of items. Delete or copy and paste additional tables in each section as needed.

Getting Started

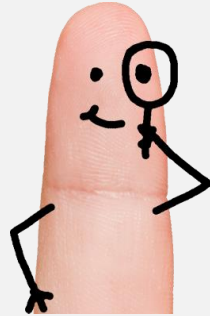
1. Open the *PR-ALL-3170-M. Annual Performance Review Form* and save a copy with the following file name convention: Doe_Jane_Performance_Review_2016_01_03.
2. Double-click on the page header to open it. Replace the **<Employee Name>** placeholder with your name, and enter the review period dates. In most cases, these span the previous year, for example, 01-Apr-14 to 31-Mar-15.
3. Complete the form electronically, not on paper.
4. Complete the fields in the Overview table. If you're unsure what to put in a field, leave it blank.

Performance Rating Scales

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

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

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



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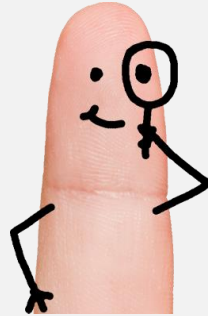
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SUCCESS TRAITS & MANAGEMENT COMPETENCIES

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	Development required immediately.
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 job in important areas that make a difference to the department or overall 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.



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- 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.

2. To include additional accomplishments, copy and paste the table as required. Insert a space between tables.

3. Where You Excel

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, and maybe even list more.

B. Position Competencies

1. Job-Specific Skills

1. List the job-specific skills needed to be successful in your position. For example, these may be technical skills, customer-service skills, or staff management skills if you manage a team or department. Refer to your job description (available from CUSTOMIZER: e.g., HR) if you're not sure what to include on the list.
2. Rate yourself using the scale in [Performance Rating Scales](#), above.

2. Company Core Success Traits

Same as above.

3. Position Success Traits

Same as above.

4. Management/Leadership Competencies

Same as above, however, this section is only completed for managers with direct reports. CUSTOMIZER: Insert your company's definition of a manager here.



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2. Competencies for Further Development

List 2 or 3 competencies you'd like to develop, and how.

3. 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 [PC-HR-1840-M. Training Reimbursement Agreement](#) may be required depending on the circumstances & cost of participation.

E. Summary Rating & Sign Off

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

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

Note: Signing the Performance Review form also means re-confirming and acknowledging your responsibility to read, understand, and abide by the policies outlined in the Employee Manual, which can be found **CUSTOMIZER: Insert "here" and link to employee manual file saved in a public directory accessible by all staff.**

Please re-review the Employee Manual before your performance review meeting. If you have any questions about what it says, please contact **CUSTOMIZER: Insert department or title (not name).**