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### Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

#### Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides
- Download your HR folders
- Identify your HR priorities
- 22 HR topics
- Create HR intranet

#### Support your HR Function

- COVID-19 Portal
- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



### Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

- ♦ Who does what?
- ♦ What happens when an employee doesn't meet expectations for the review period?
- ♦ What if an employee and manager don't agree?



If you require support or guidance relating to probationary periods, please contact CUSTOMIZER: Insert the title of the contact (not their name). Example: HR Manager.

## Why We Conduct Performance Reviews

- ♦ To pro-actively and constructively evaluate performance
- ♦ To reinforce individual strengths and support employee development
- ♦ To collectively improve the Company's overall performance
- ♦ To reinforce and clarify performance expectations
- ♦ To measure individual contributions and accountabilities
- ♦ To reward staff who exceed expectations
- ♦ To strengthen retention rates

## Who Participates

- ♦ Regular, full-time, and part-time employees are eligible for an annual performance review.
- ♦ Temporary or term employees, contractors, and consultants do not participate in the annual performance review process, though temporary or term employees may participate in an interim performance review either by request or at the discretion of their manager.
- ♦ Full performance reviews are conducted for employees who were hired before CUSTOMIZER: Insert date. Example: November 01 of the preceding year, even if a probationary review was conducted.
- ♦ **Employees who were hired after** CUSTOMIZER: Insert date. Example: November 01 of the preceding year, and have not been provided with objectives or a work plan for the following period, do not have to complete **Section 1** (Evaluating the Review Period), but must complete **Section 2** (Planning for the Next Review Period).

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2. Determine which form will be used to conduct the performance review:
  - a. *PR-ALL-3170-M. Annual Performance Review Form* – Longer, more comprehensive performance review form typically used for formal annual performance reviews
  - b. *PR-ALL-3180-M. Interim Performance Review Form* – Condensed form typically used for reviews that fall between formal annual performance reviews
3. Review the form you're using and its accompanying Instructions document. The Instructions document is a resource for employees that:
  - Clarifies the performance review process and expectations.
  - Provides information about how to use each *Performance Review Form*.
4. Provide your direct report(s) with a copy of the following documents:
  - *Annual Performance Review Form* or *Interim Performance Review Form*
  - *PR-ALL-3170-I. INSTRUCTIONS. Annual Performance Review Form* or *PR-ALL-3180-I. INSTRUCTIONS. Interim Performance Review Form*

## Step 2. Complete First Draft Performance Review Form

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1. Ask your employee(s) to complete the first draft of the *Performance Review Form* using the accompanying Instructions to guide them.
2. Give them a deadline date for returning the completed form to you.

## Step 3. Review First Draft & Add Comments

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1. Review the **Annual Performance Review** section of the *Performance Management Overview Guide*. This contains helpful guidance on completing the form, preparing for the meeting and avoiding common pitfalls.
2. Review the form as completed by the employee. Do not modify the information—ratings or comments—even if you don't agree with it.
3. Add your own comments and ratings (where applicable) to the form. Refer to the Instructions that accompany each form for information on how to complete the form, assign ratings, etc. You may also find it helpful to refer to the following documents:
  - The *JE-ALL-3530-M. Job Description Form* for the position. This lists the job-specific skills and competencies required to perform the job, as well as the core company success traits.

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- Discussing areas for development.
  - Reaching alignment in areas where you and your employee's ratings differ.
  - Discussing training plan and goals for the next review period.
  - c. Discuss your performance as a manager:
    - Make the employee feel as comfortable as possible. Let them know that you would like them to be honest in their assessment of you as a manager, and that their candid feedback is important and appreciated.
    - Make it clear that all of your direct reports are expected to provide this type of feedback, and it's an opportunity for you to develop your management skills.
    - Ensure the employee identifies 2 areas which you excel as a manager and 2 areas for development.
    - Listen for and pay attention to feedback patterns you receive from your direct reports.
  - d. Confirm next steps:
    - If no changes to the performance review form are required and it's considered final, you may ask the employee to sign the form before leaving the meeting. In this case, print two copies of the final form and have him/her sign both.
    - If the employee wants time to reflect on the performance review and perhaps add comments to the form or discuss further ideas, allow time to do so. Schedule a follow up meeting to review any further changes or comments and sign two copies of the final form.
  - e. End the meeting on a positive note, unless you are dealing with a blatant performance improvement situation. If an employee does not take constructive or negative feedback about their performance well, you may need to end the meeting before resolution can be reached. This gives both you and the employee time to reflect and prepare for a follow up meeting to discuss a solution. In this case, you must make sure a follow up meeting is scheduled as soon as possible, within 1-3 days.
4. Once the form is finalized and two hard copies have been signed:
- a. Give one copy to the employee, along with any attachments
  - b. Forward the second copy to your manager for review, including any attached comments
  - c. Your manager will sign and forward the performance review package to **CUSTOMIZER:**  
Insert individual's title, not name.

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Assign individual ratings as per the rating scale in the *Annual Performance Review Form* instructions. Strive for consistency in how you apply the ratings—consistency across your direct reports, and consistency with other managers. You may even want to get together with other managers to discuss scenarios and examples of when you would apply each type of rating.

## SECTION SUMMARY RATINGS

Once the individual goal and competency ratings have been assigned, calculate a summary rating for each section:

- ♦ Add up the total value of the ratings and divide by the number of items rated. See example:

Goal #	Rating
1	4
2	2
3	3
<b>Total:</b>	9 divided by 3 goals = Section summary rating of 3

- ♦ Exclude any item with a “5” rating as those items are deemed ‘not applicable’
- ♦ Summary ratings do not require a whole number. Round averaged ratings to a single decimal point where required
- ♦ Record the calculated summary ratings and without adjusting the results. Some discretion may be applied in the overall final summary rating, but the summary ratings for each section should simply be based on a calculation.

## FINAL SUMMARY RATING

Add up the summary ratings for each section and divide by the number of sections. See example:

Section	Rating
Goal Achievement	3
Job-Specific Skills	2
Company Core Success Traits	3
Position Success Traits	2
Management/Leadership Competencies	n/a
<b>Total:</b>	10 divided by 4 sections = Final summary rating of 2.5

The final summary rating must be rounded to a whole number.

- ♦ The highest level of reward is given to employees with a rating of 1
- ♦ Second and third highest rewards are given to employees with ratings of 2 and 3 respectively

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