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| <b>Chapter:</b>  | Human Resource Management                               |   |  |
| <b>Title:</b>  | Employee Performance Review                             |   |  |
| <b>Policy:</b> <input checked="" type="checkbox"/><br><b>Procedure:</b> <input type="checkbox"/> | <b>Review Cycle:</b> Triennial<br><br><b>Author:</b> HR | <b>Adopted Date:</b> 08.2020<br><br><b>Review Date:</b> 07.2024 | <b>Related Policies:</b><br><a href="#">Compensation and Executive Compensation</a><br><a href="#">Position Description</a><br><a href="#">Progressive Discipline</a><br><a href="#">Supervision</a> |

**Purpose:**

Hopeful Horizons (HH) has adopted a policy for the practice of administering routine performance evaluations for employees. HH bases our performance management systems on constructive feedback and open communication between managers and employees.

**Scope:**

This policy applies to:

- All HH Staff                       Selected HH Staff, as specified:  
 HH Board Members               HH Volunteers  
 Other:

**Policy:**

All HHs' employees shall have a formal performance review with their supervisor at least annually. The Chief Executive Officer (CEO) shall be evaluated by the Executive Committee of the Board annually.

HH performance review practices are intended to:

1. Ensure employees understand their job responsibilities and have specific goals to meet.
  2. Provide actionable and timely work feedback.
  3. Identify and implement performance improvement planning opportunities to address work performance, professional growth and development.
  4. Serve as an objective process upon which to base recognition and reward employee's work in financial or non-financial ways.
- A. **Review Tool and Process:** HHs' Human Resource (HR) office shall establish a standard format and process for performance reviews. The review process shall consider:
1. The employee's position description
  2. Findings and feedback provided during routine supervision
  3. Any progressive discipline the employee may have received during the review period
  4. Individual performance goals established with the employee
  5. Status and recommendations for required training and professional development
- B. **Performance Rating:** Employee performance ratings shall be based on measurable and objective criteria to the extent possible. To meet satisfactory performance an employee's review shall consider but is not limited to:
1. Meet performance targets for assigned goals
  2. Complete job duties as expected (i.e., on time, consistent with defined quality standards)
  3. Meet training and professional development requirements
  4. Comply with HH policies and procedures
  5. Work collaboratively with colleagues, clients and other community stakeholders

- C. **Self-Evaluation:** In advance of the performance review, the employee shall complete a self-evaluation based on the same criteria and content. The employee shall identify opportunities for growth and improvement and shall recommend goals for the coming year.
- D. **Performance Review:** Both the supervisor and the employee shall participate fully and respectfully in the performance review process. Together, the employee and the supervisor shall establish goals for the coming year and determine how the employee can best meet them. The employee and supervisor shall both sign the evaluation to acknowledge its completion and review.
- E. **Evaluation Dispute:** In instances where the employee disagrees with the evaluation or a portion of the evaluation results, the employee should discuss any concerns with their supervisor. If the employee is still in disagreement, they may include written comments on the evaluation form in the "Employee Comments" section of the evaluation. In cases where the employee declines to sign the appraisal, the supervisor should write "employee declined to sign" at the bottom of the form, add their initials and the date. The supervisor shall notify the CEO and HR of any related disputes including the employee's refusal to sign the review.
- F. **Performance Review Records:** A copy of the fully executed performance review shall be provided to the employee for their records and the original will be provided to HR. The performance review form shall only be shared with the appropriate management and shall become part of the employee's personnel file.

**Communication and Training:**

The Board shall receive a copy of the policy at the time of periodic review and will have an opportunity to ask clarifying questions during the approval process. Employees and volunteers shall receive notice of the Board's policy review and approval including notice of any substantive changes. The notice will provide a link to the policy located on the HH website.

Supervisors new to the position shall receive additional orientation and training in this process.

**Definitions:**

NA

**Other Related Materials:**

- Position Description
- Performance Evaluation Tool
- Supervision Records

**References/Legal Authority:**

[How to Conduct a Great Performance Review, SHRM, 2022.](#)

**Change Log:**

| Date of Change | Description of Change  | Responsible Party     |
|----------------|--|-----------------------|
| 07.2024        | This policy is updated to the new template and adds communication and training, definitions, other | R. Lucovich, HR Spec. |

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|  | <b>related material and references as applicable.</b> |  |
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