



Human Resources Supervisor's Toolkit

Staff Performance Review Guidelines

A review system encourages communication between supervisors and employees. The review proves is an exchange of information about the status and quality of work and its product and process. This communication ensures the supervisor and employees understand and acknowledge the standards and expectations of the work to be performed. Reviews can be a positive means of recognizing accomplishments, identifying goals and objectives while assisting staff members in improving job

performance. While the employee is held responsible for performance, the supervisor is responsible to provide timely feedback. Performance Reviews should be conducted on a periodic basis and should not reflect personal prejudice, bias or favoritism on the part of those conducting the ratings or reviews. The results of such reviews may be used to assist management in the decision of determining staff merit pay increases, identifying staff for promotion, informing staff of deficiencies, training needs and improvement expected, justifying disciplinary actions, and/or identifying staff for lay-off during emergency reductions in work force. Every staff employee must be evaluated at least once each year.

The following procedures are provided to assist supervisors and employees with performance reviews:

1. Supervisors prepare performance review forms for individual employees by inserting key performance responsibilities. The supervisor may wish to ask the employee for input regarding the key performance responsibilities. In all cases, the performance responsibilities need to directly relate to the position job description.
2. Employee is asked to review his/her own performance using the form. The employee will review performance, detailing ways in which s/he has met the expectations regarding performance factors and key responsibilities and ways in which s/he will continue to improve and grow in each area. The information provided will substantiate the rating.
3. Employees then indicate on the chart the point that best reflects their performance of the review period.
4. The rating scale is divided using the following categories:
 - Special Merit – Performance consistently exceeds expectations for the job.
 - Merit – Performance often exceeds expectations for the job.
 - Good – Performance consistently meets expectations for the job.
 - Needs Improvement – Performance sometimes meets expectations for the job.
 - Unsatisfactory – Performance does not meet expectations for the job.
5. The completed self-evaluation is returned to the supervisor. The supervisor reviews performance of each employee by detailing ways in which they have met each expectation regarding each performance factor and key responsibility and ways in which

they will continue to improve and grow in each area. This information is utilized to substantiate a rating also indicated by the supervisor.

6. It may be helpful for the supervisor to use a different font or color to distinguish comments and rating marking from that of the employee. If the supervisor is in agreement with the employee's review, no additions are necessary.
7. A final rating is stated by the supervisor on the initial performance review page. Although each factor is rated individually, the total rating is not necessarily a sum of the individual ratings. Based on the specific job responsibilities, one responsibility or factor may be more important than another. In all cases, however, the final rating must be relative to the individual ratings.
8. Supervisor and employee meet to discuss the review, progress made in performance, employee's self-review, supervisors review, progress toward objectives and goals for the coming year. Supervisor and employee sign the review to document performance has been discussed.
9. If an employee's final rating is Needs Improvement or Unsatisfactory the supervisor must initiate action for a Performance Improvement Plan (PIP) due to a deficiency review. The staff member should be given a clear explanation of the deficient performance or problem behavior, as well as the expected level of performance/behavior and the action necessary to meet the expectations. A timeline will be set for the necessary improvement in addition to the consequences for failure to meet the standards set forth. The supervisor shall follow up with the employee periodically to determine whether or not progress is being made to correct the issues outlined in the PIP.
10. All ratings must be reviewed and approved by the next-level supervisor prior to discussion with the employee.
11. The original form along with the final ratings, comments and signatures is retained in the in the department. The employee is given a copy of the final review upon obtaining all necessary signatures (within 30 days of the evaluation).
12. The employee may make a written statement or rebuttal within ten (10) working days of the meeting to discuss the review. If the employee chooses to do so, such statement is maintained as part of the record.