2017 GUIDELINES FOR EXEMPT EMPLOYEE PERFORMANCE REVIEW

Every year, as part of the College’s Performance Development Program, the College conducts performance reviews for exempt staff (staff paid on a salaried basis). This year’s review will commence February 27, and the completed written reviews will be due in Human Resources (HR) by close-of-business on **Friday, March 31, 2017.**

By that same date, Managers should report to their Directors or VP’s their recommendations for salary adjustments. More information on the salary adjustment portion of the review will be communicated shortly.

The components of the review process and the expectations for managers and the employees being reviewed – the “reviewees” – are much the same as last year. HR has set forth a calendar – below – for you to follow, to help you stay on track and complete the review within the time allotted.

**Needed to Start the Review**

To conduct the review managers and reviewees will need to have the following

1. The employee’s job description
2. The employee’s self-review form (filled out by the employee being reviewed prior to meeting with the Manager)
3. The performance review form – note this is a single form that must be completed if the reviewee is also a Supervisor

*If you need job descriptions contact Chery Archambeault in HR x 2756. All the 2017 performance review forms are available at* [*http://www.holycross.edu/human-resources/performance-development-program-forms*](http://www.holycross.edu/human-resources/performance-development-program-forms) *. If you do not see the forms you want to use, please contact Kate Kilby x3568.*

**Week 1: February 27-March 3, 2017**

*Manager:*

* Reviews the job description
* Reviews the prior year’s review, including performance goals set
* Reviews any other relevant documentation – e.g. feedback received concerning the employee during the year, records of counseling or discipline, etc.
* Asks the employee to fill out a Self-Review form by March 3

The *job description* defines the essential responsibilities of the job and is critical for setting work expectations during the course of the year. Role descriptions should be clear and unambiguous.  The job description also outlines the knowledge and skills needed for success in the job. Please review the job description with the employee to make sure it is accurate.

*Employee:*

* Fills out a Self-Review form & delivers to Manager by March 3

**Weeks 2 & 3: March 6 - 17, 2017**

*Manager:*

* Reviews employee’s self-review
* Schedules a time to meet with the employee
* Creates a draft of the employee’s performance review form, to be shared with the employee during the annual review meeting
* Meets with the employee to discuss the self-review, the draft performance review form, the employee’s progress towards the goals set during the prior year’s review, new goals for the upcoming year, and the plans for employee’s professional development (see below, Manager Tips for an Effective Performance Meeting”)
* Reviews with the employee the job description – does it need to be updated?

*Employee:*

* Meets with the Manager to discuss the self-review, progress towards the goals set during the prior year’s review and the plans for professional development
* Reviews with the Manager the job description – does it need to be updated?

Here are some “Manager Tips for an Effective Performance Meeting”: The meeting is the most important part of the review! Schedule the meeting in advance and allow enough time for a thorough discussion. Remember the Stephen Covey’s Habit #5 – “Seek First to Understand, Then to Be Understood” and the Ignatian “Assumption of Good Intentionality[[1]](#footnote-1).” Hold the meeting in a quiet place, away from the regular work environment, to avoid distractions or interruptions. Gather input from others – the employee’s customers, colleagues – prior to the meeting. Prepare for the meeting – practice what you intend to say in advance. Think about what the employee may say in response and prepare your own response.

**Weeks 4&5: March 20 - 31, 2017**

*Manager:*

* Edits the draft performance review and creates the final version
* Initials each page of the review and signs the front page
* Gives the review to the employee for their signature
* Gives a copy of the final signed review to the employee and keeps a copy of the review and self-review for his or her files
* Delivers the original of the final signed review and self-review to HR by the March 31 deadline
* If needed, updates the job description

*Employee:*

* On receiving the final review, reads it and signs it (the employee can also add their comments)
* Signs the review and returns it to the manager

1. “Take as your assumption that every good person should be more ready to affirm his neighbor’s proposition than to condemn it.” [↑](#footnote-ref-1)