The mid-year review for exempt employees (paid on a salary basis) and non-exempt employees (paid on an hourly basis) is part of the College’s Performance Development Program. These guidelines apply to both categories of employees. This year’s mid-year review will commence today, September 18, and should be completed by close-of-business on **Friday, October 12, 2018.**

The components of the mid-year review process and the expectations for both managers and the employees being reviewed (the “reviewees”) are less “formal” than the regular performance review. You should meet with your employees and review their performance and their progress with respect to the goals established during the last annual review (the review that took place in Spring 2018).

The mid-year discussions should be reduced to writing, shared with the individual reviewees, and retained for your own records. Unlike the annual review forms, they should not be sent to HR. Keep them in the department files for reference at the next annual review.

The review purpose is *developmental*, to help employees do their best work and find satisfaction, reward and purpose. However, if the employee is not meeting expectations despite normal developmental interventions and you identify the need for a performance improvement plan, you should seek advice from Bruce Bacon, Associate Director for Employee Relations who can guide you through that process. Bruce is at x3423.

Please note that for this fiscal year - 2018-19 - the annual review will take place in January 2019 (Academic Affairs already moved to this new schedule for last year’s review). The January annual review date is based on feedback that this is the most convenient month for an exercise like performance review (this is not to say that January is the best month for everyone, but it is best overall). We will continue to accommodate those departments who need to conduct their reviews at a different time.

*Note on job descriptions:* The mid-year review is also a chance to review job descriptions. The job description defines the essential responsibilities of the job and is critical for setting work expectations during the course of the year. 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. *If you need copies of job descriptions, contact Kate Kilby in HR x 3568.*

**Needed to Start the Mid-year Review**

1. The employee’s job description.
2. The completed form from the last annual review.
3. *Optional*: the employee’s self-review - filled out by the employee being reviewed prior to meeting with the Manager. As as with the annual review, it is often helpful if the employee completes a self-evaluation prior to the review. Some departments use the self-review only n the exempt review process, some use it for both exempt and non-exempt, and either way is acceptable. The self-review could be as simple as a short paragraph in an e-mail or memo or, if you wish, you can use the applicable Self-Review form from last year’s annual review process (all forms are at <http://www.holycross.edu/human-resources/performance-development-program-forms>)

**Week 1: September 18-21, 2018**

*Manager:*

* Reviews the job description.
* Reviews the prior performance 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.
* *If you are utilizing the self-review:* Ask the employee to send the information by September 14.

**Weeks 2 & 3: Sept. 24-Oct. 5, 2018**

*Manager:*

* *If you are utilizing the self-review:* Reviews employee’s self-review.
* Schedules a time to meet with the employee.
* Creates a draft of the employee’s mid-year performance review, to be shared with the employee during the mid-review meeting. The review could be as simple as a memo to the employee or, if you wish, you can use the applicable Review form from last year’s annual review process (all forms are at <http://www.holycross.edu/human-resources/performance-development-program-forms>)
* Meets with the employee to discuss the draft mid-year performance documentation and, if applicable, the self-review documentation. These discussions should include the employee’s progress towards the goals set during the previous year’s performance review, edits, updates or creates new goals for the balance of the year, and the plans for the employee’s professional development.
* Reviews with the employee the job description – does it need to be updated?

*Employee:*

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

**Week 4: Oct 8-12, 2018**

*Manager:*

* Edits the draft mid-year performance review documentation and creates the final version.
* 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 (if applicable) for the manager’s files.
* If needed, updates the job description and sends an electronic copy to HR to update current records.

*Employee:*

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

*All the 2018 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 have questions, please contact Kate Kilby x3568.*