The performance 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. You can start now but this year’s review will commence January 2, 2020 and should be completed by close-of-business on **Friday, February 7, 2020.**

The expectation is that the manager conducting the review and the employee being reviewed (the “reviewee”) engage in a “formal” performance review process. You should meet with your employees and review their performance and their progress with respect to the goals established during the last mid-year and/or annual review (the review that took place in Spring 2019, the review period is from February 2019 through January 2020).

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.

*Note on job descriptions:* The performance 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 go over the job description with the employee to make sure it is accurate. *If you need copies of job descriptions, contact Kim McCullen in HR x 2756.*

**Needed to Start the Performance Review**

1. The employee’s job description.
2. The completed form from the last annual review.
3. *Optional*: the employee’s self-reflection - filled out by the employee being reviewed prior to meeting with the Manager. It is often helpful if the employee completes a self-reflection prior to the review. Some departments use the self-reflection only in the exempt review process, some use it for both exempt and non-exempt, and either way is acceptable. The self-reflection could be as simple as a short paragraph in an e-mail or memo or, if you wish, you can use the applicable Self-Reflection form from last year’s annual review process (all forms are [HR Performance Program Development Forms](https://www.holycross.edu/human-resources/forms))

**Week 1: January 6- 10, 2020**

*Manager:*

* Go over the job description.
* Go over the prior mid-year and/or performance review, including performance goals set.
* Go over 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-reflection:* Ask the employee to send the information by January 11.

**Weeks 2 & 3: January 13-24, 2020**

*Manager:*

* *If you are utilizing the self-reflection:* Go over employee’s self-reflection.
* Schedules a time to meet with the employee.
* Creates a draft of the employee’s performance review, to be shared with the employee during the 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. Meets with the employee to discuss the draft of the performance documentation and, if applicable, the self-reflection documentation. These discussions should include the employee’s progress towards the goals set during the previous mid-year and/or 2018 performance review, edits, updates or creates new goals for the balance of the year, and the plans for the employee’s professional development.
* Go over with the employee the job description – does it need to be updated?

*Employee:*

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

**Week 4: January 27-31, 2020**

*Manager:*

* Edits the 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-reflection (if applicable) for the manager’s files and **forwards the signed original to HR by the due date of February 7, 2020.**
* 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 2020 performance review forms are available* [*https://www.holycross.edu/human-resources/forms*](https://www.holycross.edu/human-resources/forms)*. If you have questions, please contact Kate Kilby x3568.*