The performance review for salaried and hourly paid employees is part of the College’s Performance Development Program. These guidelines apply to both categories of employees. This year’s review begins today and should be completed by close-of-business on **Monday, March 1, 2021.**

Managers should meet with employees and review their performance and their progress towards the goals established during the last annual review (the review that took place in Spring 2020). The period of performance to be reviewed is from February 2020 through January 2021.

The review should be a *developmental* exercise. Holy Cross managers are expected to help employees to do their best work and find satisfaction, reward and purpose in their jobs - the review is a tool to help managers with that task. However, if the employee’s performance 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, Deputy Chief Human Resources Officer, who can guide you through that process. Bruce is at x3423.

*Note on job descriptions:* The performance review is also a chance to review employee 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. The job description also outlines the knowledge and skills needed for success in the job. The best job descriptions are clear and unambiguous.  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.*

*Note on Review Forms:* All [HR Performance Program Development Forms](https://www.holycross.edu/human-resources/forms#performance)are available on the HR Website. This year, for salaried employee reviews, managers have the choice to use the regular format forms or the special “COVID period” review form - check with your Division HR Liaison to see if there is a preferred form for your Division. The COVID period review form includes specific questions about the impact of COVID-19 on the work of the employee.

**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 for salaried employees, some use it for both salaried and hourly employees, and either way is acceptable. All the review forms either have a place for self-reflection, or there is a separate self-reflection form available. If you don’t want to use a *form*, the self-reflection could be as simple as a short paragraph in an e-mail or memo.

**Week 1: January 25-29, 2021**

*Manager:*

* Go over the job description.
* Go over the prior 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 29.

**Weeks 2 & 3: February 1-12, 2021**

*Manager:*

* *If you are utilizing the self-reflection:* Go over employee’s self-reflection.
* Schedule a time to meet with the employee.
* Create 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 or the special COVID period review form.
* Meet with the employee to discuss the draft of the performance documentation and, if applicable, the self-reflection. These discussions should include the employee’s progress towards the goals set during the previous performance review.
* Edit, update or create new goals for the balance of the year.
* Edit, update or create plans for the employee’s professional development.
* Go over the job description with the employee – does it need to be updated?

*Employee:*

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

**Week 4 & 5: February 15-28, 2021**

*Manager:*

* Edit the performance review documentation and create the final version.
* Give the review to the employee for their signature.
* Give a copy of the final signed review to the employee and keep a copy of the review and self-reflection (if applicable) for the manager’s files and **forward the signed original to HR, or place the electronic file on the manager’s x-drive (see instructions below), by the due date of Monday, March 1, 2021.**
* If needed, update the job description and send an electronic copy to HR to update current records.
* One person within each division or the Department Head in Admin and Finance will gather the electronic files of the final performance review and place them in their x-drive (located here X:\HR-Restricted\Last Name, First Name\2021 Perf Rws) for HR to collect and process. Please save files using this filename format: Employee ID, Last Name, First name\_department name e.g. 050556, Smith, John\_ITS. Please contact Kate Kilby, 3568, with any questions about delivery of reviews via the x-drive.

*Employee:*

* On receiving the final review, read it and sign it (the employee can also add their comments).
* After signing, return the review to the manager.

*All the 2021 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.*