

Semi-Annual Performance Review Guidelines

The semi-annual performance review is an opportunity for Foundation staff to meet with their supervisor to discuss accomplishments, goals, priorities, performance, and expectations. This is also an opportunity to focus on professional development plans.

Performance Review Process:

Supervisor's will schedule dates in both January and again in July to meet with each of their employees for a performance review. A minimum of one hour should be scheduled for each review.

Three weeks prior to the review date, the supervisor will provide the employee with a Semi-Annual Performance Review form to be completed. To prepare for completing this form the employee should consider the following questions:

- During this review period, what have been your most significant accomplishments? What have you learned, and what do you feel you should be focusing on in the future?
- What were your goals/priorities, and have you been successful in achieving these goals? If yes, what specifically attributed to your success? If not, what needs to change in order for you to improve your performance and achieve established goals?
- In what way can your supervisor help you to be more efficient/effective?
- If there are issues or road blocks you are currently facing, in what ways might you be able to overcome these problems – with your supervisors help, or without.
- What progress have you made toward your professional development goals and what will you do to continue to develop?

After thinking through these questions, the employee will complete and return the Semi-Annual Performance Review Form to his/her supervisor. The form should be returned to the supervisor two weeks prior to the scheduled meeting date.

The supervisor will then have two weeks to complete the supervisor response portion of the Semi-Annual Performance form. The supervisor should prepare to complete this form by doing the following:

- Review the employee's personnel file to refresh your memory regarding agreed upon goals, as well as any feedback or recognition that has taken place in the past six months.
- Be prepared to share your view of the progress the employee has made on goals/priorities, and think about what goals/priorities should be set for the next six-month period.
- Be prepared to share specific examples of what the employee is doing well, as well as anything that could be done differently to make him/her more successful in the future.

During the Performance Review meeting, the supervisor and employee should be sure to cover all of the following:

- The employee's goals/priorities for the next six-month performance period.
- Feedback from the supervisor regarding the employee's recent performance.

- Challenges or roadblocks the employee is concerned about, and ways in which management can help to alleviate these issues.
- Progress on the employee's professional development plan and what management can do to support this plan. Long-term career aspirations, if any, should also be addressed.
- Discussion and agreement regarding follow up action items, and the date of the next performance review.

Following the performance review between employee and supervisor, the review should be sent to the President & CEO and then to the Director of Administration for filing.

Staff Feedback Form:

Another opportunity available to employees during the review periods (January and July) is to complete a Staff Feedback form for any other staff member(s). This may include your supervisor, another supervisor on staff that you interact with, or a co-worker. The purpose of the review is to share positive feedback and/or constructive criticism regarding your interactions with others on staff. A separate form should be completed for each person being provided feedback. Reviews may be anonymous (but don't have to be), and should be submitted in either a sealed envelope or via email to the President & CEO anytime during the months of January and July. All comments will be reviewed by the President & CEO and shared with relevant staff. If the review is for the President & CEO, it may be submitted to the Director of Administration for review prior to being shared with the President & CEO.