|  |  |
| --- | --- |
| **Responsibility** | CEO / Manager for staffChairperson / Employment Committee for CEO / Manager |
| **Summary** | The employer / employee relationship should be based on mutual open and honest feedback throughout the year. The employer will provide on-going coaching, training, support and development so that the annual performance review just confirms the key points in writing.Staff Performance Reviews: The CEO/ Manager of name of organisation is responsible for ensuring annual performance reviews are completed for all staff. A less formal discussion about performance should take place on a quarterly basis so that there are no surprises during the annual review. CEO / Manager Performance Review: The Chairperson / Employment Committee of name of organisation is responsible for ensuring an annual performance review in completed for the CEO / Manager. A less formal discussion about performance should take place on a quarterly basis so that there are no surprises during the annual review. Feedback should be sought from board members, employees, volunteers and other stakeholders regarding the performance of the CEO. |
| **Procedure** | 60 Days Prior to ReviewCEO / Manager / Chairperson identifies employees who are due for a review within the next month and: * Informs the staff member in writing of the pending performance review
* Invites the staff member to complete the Let’s get Real self-assessment
* Provides other staff members with 360 Degree Performance Survey to complete on the staff member being reviewed
* Provide the staff member with a copy of their current position description
* Provide the staff member with the individual development plan
* Invite staff to arrange support/family/whānau at the review

14 Days Prior to ReviewThe staff member being reviewed ensures that the following documents are completed or up to date before sending a copy it to the person conducting the review:* Self-assessment
* Individual development plan
* Position description with comments
* Current driver license
* Any other documentation deemed relevant to the appraisal/review
* Inform the person facilitating the review if support/family/whānau will attend

7 Days Prior to ReviewCEO / Manager:* Completes the relevant parts of the individual appraisal/review
* Reviews the documentation submitted by the staff to be reviewed
* Ensures that all relevant documentation is completed and available
* Confirms the time, date and participants of the appraisal/review
* Ensures 360 Degree Performance Surveys have been returned for the staff member being reviewed

During ReviewPerson conducting the review & staff member being reviewed:* Conduct the review in a transparent and consultative manner
* Record all discussions, comments and decisions on the individual performance review document
* Agree on goals and plan for the coming year

Within 10 Working Days of the ReviewThe person conducting the review:* ensures that all records are completed and signed off by both parties
* the documentation is filed in the personnel records
* Person who manages payroll is notified of any salary or any other changes to employment
* a copy of the documentation is provided to the staff member reviewed
 |
|  |  |
| **References**  |  |
| **Related Policy** | Employment – Performance Appraisal Policy v1 |
| **Service Documents** | Staff Code of Conduct |
| **Forms / Templates** | Role Position Description/s360 Degree Performance SurveyPerformance Appraisal Template |
| **Links** | [www.employment.govt.nz/workplace-policies/employee-performance/](http://www.employment.govt.nz/workplace-policies/employee-performance/)[www.business.govt.nz/hiring-and-managing/getting-the-best-from-people/performance-appraisals/](http://www.business.govt.nz/hiring-and-managing/getting-the-best-from-people/performance-appraisals/)<https://www.surveymonkey.com/mp/360-degree-employee-evaluation-survey-template/>  |