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| **Responsibility** | CEO / Manager for staff  Chairperson / 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 Review  CEO / 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 Review  The 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 Review  CEO / 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 Review  Person 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 Review  The 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 |
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| **References** |  |
| **Related Policy** | Employment – Performance Appraisal Policy v1 |
| **Service Documents** | Staff Code of Conduct |
| **Forms / Templates** | Role Position Description/s  360 Degree Performance Survey  Performance 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/> |