

EMPLOYMENT – Performance Appraisal Procedure

Responsibility	<p>CEO / Manager for staff</p> <p>Chairperson / Employment Committee for CEO / Manager</p>
Summary	<p>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.</p> <p>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.</p> <p>CEO / Manager Performance Review: The Chairperson / Employment Committee of name of organisation is responsible for ensuring an annual performance review is 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.</p>
Procedure	<p><u>60 Days Prior to Review</u></p> <p>CEO / Manager / Chairperson identifies employees who are due for a review within the next month and:</p> <ul style="list-style-type: none"> •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 <p><u>14 Days Prior to Review</u></p> <p>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:</p> <ul style="list-style-type: none"> •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 <p><u>7 Days Prior to Review</u></p> <p>CEO / Manager:</p> <ul style="list-style-type: none"> •Completes the relevant parts of the individual appraisal/review •Reviews the documentation submitted by the staff to be reviewed

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	<ul style="list-style-type: none"> • 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 <p><u>During Review</u></p> <p>Person conducting the review & staff member being reviewed:</p> <ul style="list-style-type: none"> • 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 <p><u>Within 10 Working Days of the Review</u></p> <p>The person conducting the review:</p> <ul style="list-style-type: none"> • 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/ 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/

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