

PERFORMANCE REVIEW INSTRUCTIONS

(For non-supervisory personnel)

Attached are the instructions, schedule, and Personnel Action Form (PAF) for your employees' 3 month, 6 month or annual performance review.

STAGE 1:

- Meet with your employee and have him/her identify two/three colleagues (internal or external - someone with whom employee interacts with on regular basis) to complete the "Input Summary Form." You, the supervisor, should add at least one additional source. *(These forms are confidential and should not be shared with the employee – please keep in a secure place or shred after use)*
- Distribute, collect, and review the "Input Summary Forms."
- Review the employee's Self-Appraisal Form.
- Complete the supervisor appraisal form. Include concrete examples, measurable data and performance review information that connects the employee's work to ASAE's Mission and Strategic Plan.
- Complete the enclosed Personnel Action Form (PAF) for proposed salary adjustment. Remember guidelines for salary adjustments and for your budget projections. Sign both the Review Form and the PAF. Review with your Senior Vice President and obtain his/her signature.
- **Submit the entire packet (*Supervisor Appraisal Form, Self Appraisal Form, updated job description, signed ASAE Code of Conduct, and PAF*) to the Director of Human Resources for budget and content review by the date indicated on the supervisors appraisal form.**
- Please update the job description if necessary and send it electronically to HR. If there is no change to the job description, please indicate this on the review.

STAGE 2:

- After HR has reviewed the packet, it will be returned to you so that you may discuss the review with your employee.
- HR will send the PAF to Finance for salary adjustments that are effective the first of the month of the review month.
- Supervisor conducts the review with the employee.
- After completion of the review meeting, the supervisor and the employee should sign the review, which only indicates that the meeting has taken place. If the employee does not agree with the review, he/she may write their comments on a separate sheet that will be included and filed with the review.
- Return the performance review form and the self-appraisal to HR within the month that it is due.
- HR will update all Human Resource Information System (HRIS) files. Remember - new non-exempt employees receive a three-month review and a six-month salary/performance review. New exempt employees receive a six-month performance review and an annual

salary/performance review. Thereafter, all employees are on an annual performance review schedule.

- When process is complete, the review becomes a part of the employee's permanent personnel folder.

Performance Review forms and Summary Input Forms can be found on the "Shared" drive under the *HR Forms* folder.

Note: Salary increases higher can be no higher than 3% for FY'04'.

If you have questions or comments during any phase of this process, please feel free to contact the HR Director or Employment Manager.

EMPLOYEE PERFORMANCE EVALUATION (Non-Supervisor)

***Remember – save this document to your personal drive ***

Updated on 7/03)

Employee Name: _____ Supervisor's Name: _____
Position: _____ Work Group: _____
Sr/Exec Vice President: _____ Date of Hire: _____
Date of Last Review: _____ Due Date of This Review: _____

This performance evaluation is a permanent record of the employee's job performance while employed at ASAE.

The performance evaluation is based upon accepted standards of the employee's work title and responsibilities. The value of this review depends on the supervisor's rating based on observation, on collected information from peers and the individual, and on sound judgment. The ratings are made with care and fairness and take into consideration the employee's own self-appraisal of his/her performance.

The supervisor completes this form after receiving both the self-appraisal and the input summary reviews and discusses the evaluation with the group Senior VP or EVP. The form is then submitted, with appropriate signatures and salary adjustment PAF, if appropriate, to the Director of Human Resources by the date requested. HR reviews and returns the form to the supervisor to review with the employee. The employee is asked to sign the review to indicate that the review meeting has been completed and may attach his/her own statements if desired. HR receives the completed review, completes appropriate financial paperwork and files in the employee's personnel folder.

RATING DEFINITIONS

SUPERIOR: Outstanding performance in all or nearly all areas of performance. Results clearly and consistently exceed goals and objectives defined for the position. Completes position responsibilities in an exemplary fashion and consistently finds new and efficient methods of enhancing the position. May be promotable or able to assume more responsibility.

EXCEEDS EXPECTATIONS: Consistently achieves results in the responsibilities assigned. Delivers performance that contributes to established goals and objectives of the position with a minimum of supervision. Occasionally finds new and efficient methods of enhancing the position.

MEETS EXPECTATIONS: Meets standards for the position and fulfills the duties and responsibilities of the position. Performance is competent and supervision required is generally appropriate for the position. Completes tasks competently and with few errors.

_____ **JUDGEMENT:** Knows options and recognizes consequences of decisions and demonstrates logical thinking, timing, and insight. Consider use of common sense and best judgment with resources at hand for both normal and unusual situations and responses under ordinary conditions and under pressure.

_____ **INITIATIVE:** Identifies situations that can be improved; recognizes potential problems and acts promptly and independently, or refers appropriately for solutions as appropriate. Consider the gravity and/or uniqueness of situation(s), appropriateness of action, and follow-through. Consider knowing when to refer to higher decision-maker.

_____ **OVERALL SERVICE ORIENTATION:** Responsive in dealing with co-workers, members, prospects and the general public. Takes individual responsibility for service delivered. Consider completeness, timeliness, quality, and courteousness of service.

Describe important accomplishments and any changes in responsibilities since last review.

Relating of Position to ASAE Mission and Strategic Plan - Describe how successful fulfillment of this position accomplishes the organization's mission and goals.

Improvements needed in any of these areas.

Top Priority Programs – if appropriate.

Priority Program(s) _____

List accomplishments and other relevant activities. This section may account for 10% of the review.

_____.

How can ASAE and the Supervisor can assist employee improve his/her performance.

_____.

OVERALL PERFORMANCE RATING: Consider final rating based on central tendency

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement

Supervisor-Note: Please attach the employee self-appraisal to this document

Employee Comments: I have reviewed the above evaluation and discussed it with my supervisor. My signature below shall not be construed to mean either agreement or disagreement with this evaluation, but rather the acknowledgment that the evaluation/meeting has been completed. I understand that I have the right to append comments to the evaluation if I so desire.

Are there any appendages to this document? Yes _____ No _____
If yes, explain in space provided.

Employee Signature _____

Date _____

Supervisor Signature _____

Date _____

Senior VP or EVP Signature _____

Date _____

Director of Human Resources Review _____

Date _____