352: Performance Appraisal

300: Human Resources · https://milo.masseyservices.com/docs/352-performance-appraisal/

Section: Human Resources
Subject: Performance Appraisal
Approved by: Jean L. Seawright
Effective Date: 15 December 1995
Last Reviewed Date: 15 December 1995
Policy Owner: Director of Human Resources

Policy

Purpose

A performance appraisal program is a performance measurement system designed to motivate employees and improve their efficiency and effectiveness. Performance evaluations help management and employees:

- ensure an understanding of the position requirements;
- reinforce desired performance and correct performance deficiencies;
- facilitate communication between employees and their managers;
- plan training and other development opportunities; and
- determine appropriate salary/employment actions.

Program Summary

Our performance appraisal program includes the following:

1. Introductory Period Performance Appraisal - For new employees who have completed their six month introductory period and for employees who have completed six months into a newly assumed position. This written review is required regardless of whether or not an increase is granted.

- **This form must be completed by the manager and reviewed with the employee prior to the end of the six month introductory period. The form must be completed for all employees including those few who are not recommended for continued employment.**

2. Self-Appraisal - For the employee to complete and submit prior to the manager's appraisal meeting. This form is for use during the normal annual review session and does not apply to the Introductory Period Appraisal session. This form provides the basis for dialogue between the employee and manager.
   - This form should be given to the employee at least two weeks in advance of the review date so there is enough time for the employee to carefully consider his/her response and submit the form and for the manager to consider the response when completing the Annual Performance Appraisal form.

3. Performance Appraisal - For completion just prior to the anniversary date as part of the annual review for each employee, or for use in evaluating employee performance at special times such as when a merit increase is approved, when immediate performance improvements are necessary, or after the completion of a special probationary period for regular employees (normally imposed because of performance deficiencies).
   - **This form must be completed by the manager and reviewed with the employee prior to the end of the anniversary date or prior to the end of the review period.**

4. The Appraisal Conference - Each time an appraisal is administered, the manager will meet with the employee privately to discuss the evaluation. The meeting must always conclude with a mutual understanding and agreement of the employee's responsibilities and the objectives for target dates.

Increases in pay are not automatically granted at the time of the review. Pay increases are based on individual performance, company performance, and other external factors.

> **Remember then integrity of the program can only be maintained if managers complete and administer these appraisals on a timely basis. *Employees take pride in their work and to feel appreciated and respected. This formal process offers an opportunity to show appreciation or indicate where activities need improvement.***

Procedures

1. At the beginning of each month, the Payroll Department will run a list, by Service Center, of all employees with annual anniversary dates and six month anniversary dates in the following month. This list will be sent to each General Manager, who will ensure completion of the Performance Appraisal. Regional Managers will also receive a copy of the list and are responsible for following up with General Managers to ensure appraisals are completed.
2. All original Performance Appraisals must be sent to Corporate (along with ESF's when increases are granted). Human Resources will track all appraisals that are received to help ensure they are completed and submitted on a timely basis. Original Performance Appraisal forms will be retained in the permanent personnel file at the Corporate Office. Service Centers may retain a photocopy of the performance appraisals.
3. For appraisals other than the initial Introductory Performance Appraisal, the employee will complete the Self-Appraisal Form and submit it to the Manager. The Manager will complete the Performance Appraisal Form and arrange a meeting to review both forms.
4. The employee will sign the Performance Appraisal Form, indicating that he/she has reviewed the form and discussed the contents with the Manager.
5. Managers must obtain a commitment and gain specific agreement from the employee that any required improvements will be made.
6. Employees are invited to document any comments on the appraisal form or on a separate sheet of paper.
7. Conclude the session with a hand-shake and on a positive note.
8. Follow-up with the employee periodically to determine what progress the individual is making, particularly on those matters or goals which were agreed upon.

> **Consult additional training materials for information on how to conduct a performance appraisal meeting.**

Management Responsibility

The appraisal of employees' job performance is part of the normal daily responsibility of every Manager and relates directly to his or her responsibility for planning and assigning work. Essentially, Managers evaluate an employee's performance each day...the annual written appraisal simply

reduces into writing the employee's level of performance that the Manager is already intimately familiar with.

Managers must ensure consistency when appraising work performance. That is, employees in the same position must be evaluated on the same required standards. Additionally, Managers must ensure that appraisals provide an honest and true representation of the performance level. Documentation must be job-related and factual. It cannot be based upon hearsay or insufficient feedback. ***Managers have a responsibility to be truthful, honest and fair.*** Take time to do the appraisal correctly!

Downloads

Embedded media: https://milo.masseyservices.com/wp-content/uploads/2025/09/352-Performance-Appraisal.pdf

352 Performance AppraisalDownload