

Performance Review Policy Template

1.PURPOSE

1.1 The objective of this policy is to try and provide a link between the overall vision, strategic priorities and goals of the company with individual goals, performance standards and expectations, and formalize information for reward and recognition programs (based on objective parameters) within the organization. The vision and strategy incorporates financial, internal business processes (services of care), learning and growth and customer objectives, measures, targets, and initiatives.

1.2 To guide all employees through the performance appraisal process in order to manage and contribute to improving overall performance and the achievement of objectives.

1.3 To provide guidelines for the supervisor and employees to discuss and assess the employee's performance, and to provide guidelines for training / development, follow-up and review.

1.4 To improve the channels of communication between managers, supervisors, and staff contributing to the developing of a better and more productive environment that actively supports continual quality and practice improvement and safety.

1.5 This policy must be read in conjunction with the probationary review policy, and the policies on competency, Training and Development.

2.POLICY

2.1 The performance appraisal scheme applies to all employees of the Organization. The scheme is customized to meet the particular needs of the specific roles and responsibilities of all levels of employee throughout the organization (includes all administrative and clinical staff).

2.2 Achievements are reviewed against goals or objectives, and with regard to the main competencies, for every profile depending on job description titles, and which may include:

2.2.1 Strategic skills

2.2.2 Operating Skills

2.2.3 Courage ;Energy & Drive

2.2.4Teamwork

2.2.5Productivity

2.2.6Responsibility

2.2.7Accountability

2.2.8Personal and Interpersonal Skills including conflict and political negotiation, teaching, coaching, communication and consultation.

2.2.9(The above incorporate the employee's specific achievements / aspirations incorporating the organization's Mission, Vision, and core values)

2.3 Completion of all mandatory training and relevant department specific competencies; general orientation processes all signed off, including introductions to quality and risk management, are mandatory.

2.4 An employee will be expected to participate annually in the performance management process; all employees will be asked to self-appraise, in the first instance. The first annual appraisal takes place a year after the employee joins the organization regardless of when the probationary appraisal takes place.(Employee will fit into yearly appraisal planning process: objective setting and review Mid-year, and review at the end of the year.)

2.5 Appraisal does not remove a manager's responsibility to establish and maintain a dialogue with an employee regarding their performance on a day-to-day basis, but provides a positive opportunity to motivate employees and stand back from day-to-day matters and take stock of all these discussions.

2.6 Appraisal should not be used as a disciplinary mechanism to deal with poor performance, but may provide evidence of action taken that would support the implementation of other means thereby improving performance, and discontinuation of what might be disturbing trends.

2.7 Information gathered during appraisal will be confidential to the parties involved, i.e. the employee, immediate manager of the employee, HR, and executive.

2.8 The performance appraisal for all clinical staff makes use, additionally, of the following as basis for the review:

2.8.1 Chart Reviews / Peer reviews

2.8.2 Mortality and Morbidity; procedural outcomes

2.8.3 Incident Reports

2.8.4 Client Satisfaction Survey "as necessary and pertinent

2.8.5 Desired work behaviors: teamwork, collegiality, etc.

2.9 Board and Directors Appraisal Review

2.9.1 The process of evaluating the performance of the Board as a whole is the responsibility of the Board under the direction of the Chairman. The evaluation of Board performance involves:

2.9.1.1 At the start of a period, the Board discussing the objectives to be achieved.

2.9.1.2 At the end of the relevant period, the Board assessing the extent to which objectives were achieved by the Board.

2.9.1.3 Assessment of individual directors' performance is a process determined by the Chairman, and draws on a range of techniques, including: discussion of Board and individual directors concerning their perceptions about the Board and Directors performance; and one-on-one interviews of directors with the Chairman when perceived as necessary.

2.9.1.4 The Board assesses the CEO.

2.10 The performance evaluation of the Chief Executive Officer is the oversight function of the Board. The evaluation of the Chief Executive Officer involves an assessment of a range of factors including the overall performance of the Company and the achievement of pre-determined goals.

2.11 Executives / Management team

2.11.1 All company executives (other than the Chief Executive Officer) are subject to annual

performance review by the Chief Executive Officer and if applicable, in conjunction with another senior executive.

2.11.2 Executives are assessed according to various criteria, which may include:

2.11.2.1 Completion of key job specifications and goals.

2.11.2.2 Contribution towards specific business plan objectives.

2.11.2.3 Effectiveness of leadership role played in heading up Operational

Committees and Contribution towards Board / Operational

Committees.

2.11.2.4 The outcomes of executive performance reviews are reported to the Board, which has overall responsibility for ensuring that adequate performance management processes are in place for all executives.

2.12 The Performance Management Procedure can be applied for periods of less than a year (interim appraisal) if Performance Management issues are raised.

3. PROCEDURE

3.1 Department manager/ immediate manager and each individual employee identifies an action plan: priorities, objectives and targets for a yearly time period on which an employee will be evaluated. Interim goals (6 monthly) must be action planned and followed up on time, and documented as having been completed

The timelines:

• May-June, midyear: HR will "nudge" everyone into the beginning of the APR (Annual Performance review)

• Employees are expected to initiate the process by completing self-reviews/comments

• Self-review comments include (e.g.); "How have you performed on your KPIs, the challenges and achievements so far?"

• Once manager has reviewed submission, a discussion will be held and targets agreed

• Nov-Dec, Annual review: employee will receive feedback at Mid/End of year, based on the actual achievements as compared to targets agreed during the cycle (beginning of the year)

• Specific development areas, trainings and next steps will be agreed between managers and subordinates, based on the review discussion

3.2 An Agreement will be in place between the team manager and the individual employee on the annual goals set.

3.3 Self-Appraisal by the employee will be carried out on the basis of identified competencies and goals as per pre-defined targets and goals. Members of staff / superiors and subordinates will be asked how they perceive the employee (constructively scripted).

3.4 The Manager will conduct the performance review for each individual team member within their department. This will be carried out in a formal one-on-one discussion format and includes but is not limited to job description requisites, desired work behaviors, patient satisfaction surveys, what the employee may further require from the company).

3.5 The Employee and Manager agree on the rating (both for objectives, and competencies) of the individual for the last period's performance, with the action plans/goals and objective setting for the next year's time period and an achievable development plan (using the acronym SMART):

• Specific / strategic

• Measurable

• Achievable

• Timeframe

To achieve higher productivity and performance. Both sign to this effect.

Quick Check while doing the Performance Review:

• Objective Setting Sheet- This sheet is used for Goal Setting process along with the employee.

It is not necessary to have 5 Objectives, one can also have 4 or 6 depending on the role and

complexity.

â€¢ Total Sum- Please make sure the total sum of all the Objectives should not exceed 100 i.e. One goal can have a maximum of 25% or minimum of 10% weightage attached to it.

â€¢ Examples are available from HR to guide employees and managers

â€¢ Objective Evaluation Sheet- Annual Evaluation Achievement means how much does the Manager feel an employee has achieved. For e.g. if any goal had a weightage of 25%, how much the manager feels it is achieved? It can be 15-20-25% depending on manager evaluation.

â€¢ Behavioural Competency Review- This can be done completely by the Managers, This must be discussed with and signed off by the employee

3.6 Appeal Procedure: Where an agreement is not reached and friction disrupts the department, the issue should be referred to the Senior Manager within the service area who will, within 5 working days, listen to the concerns of both parties and facilitate an agreement or a way forward which both parties are committed to.

3.6.1 Where an agreement is not reached and both parties are committed to working effectively, parties can agree to disagree and sign to that effect.

3.6.2 If on review a senior manager feels that 3.6.1 is not appropriate, the manager must initiate discussions with the parties concerned. This process and its outcome must be documented on the said Appraisal form.

3.6.3 If disagreement persists the matter will be referred to the head of department who will, within 5 working days, hear the concerns of both parties and resolve the matter.

3.6.4 The decision of the head of department will be final and given, in writing, within 5 working days of the meeting.

3.6.5 In cases where the head of department is involved with Stage One of the procedure, or unavailable, the matter will be referred to COO/Director-HR, by mutual agreement.

3.7 This performance process supplies data and information to HR KPIs;

CONTRIBUTION FROM THE EMPLOYEE; DISCIPLINE AND DILIGENCE FOR SEEING THE PROCESS COMPLIED WITH informs quality process within HR and contributes to the employee performance appraisal, in line with strategic goals and objectives target plans

4. REFERENCES

4.1 Policy and procedure on Grievance

4.2 Probation performance review policy

4.3 PMS Objective and goal setting, and competency forms

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