

Annual Performance Review: Guidelines for Supervisors



The supervisor who conducts the annual performance review meeting is crucial to the effectiveness of the process. Here's a set of Guidelines you can adapt to ensure your own supervisors are properly prepared.

ANNUAL PERFORMANCE REVIEW: GUIDELINES FOR SUPERVISORS

SUPERVISOR'S ROLE

As supervisor, you play a critical role in assessing, evaluating and improving employee performance. Your role throughout the year is to observe how employees do their job, provide clear and constructive feedback and communicate the Company's expectations and goals.

ANNUAL PERFORMANCE REVIEW

The annual performance review is the culmination of this process. It consists of your sitting down with the individual employee to, among other things:

- Recognize the employee's efforts and achievements;
- Identify shortcomings and problems requiring improvement;
- Clarify expectations and improvement goals for the coming year.

Your job is to summarize these discussions in writing for Company HR and administrative staff using the appropriate performance review form.

PURPOSE

The purpose of these Guidelines is to help you prepare for and conduct the annual performance review and properly analyze and report the results.

BEFORE THE PERFORMANCE REVIEW

Contact the employee to set up the performance review at a mutually agreeable and convenient time and place. It is important that you be properly prepared for the performance review by ensuring that you have:

- Thorough knowledge of the employee's performance, work behaviours, skills and results for the year based on your own observations and feedback from others,

- including the employee him/herself;
- A completed Annual Performance Review Form for the particular employee summarizing the above; and
- A list of items to discuss during the review.

DURING THE PERFORMANCE REVIEW

The performance review should be a two-way conversation that discusses:

- The job description and current job duties;
- The performance expectations of each side going into the year;
- What was and should have been accomplished during the year;
- The comments, observations and concerns of each side regarding the past year;
- The expectations and goals for the coming year;
- The details of any improvement plans to be undertaken; and
- Any other topic the employee or you want to cover.

AFTER THE PERFORMANCE REVIEW

When the meeting ends, tell the employee that you will summarize the results in a performance review form for HR. Ask the employee to sign the form and offer him/her the opportunity to attach comments. Complete the review form, sign it and submit it to HR.