



**Policy 1.1.13: Employee Annual Performance Reviews
East Multnomah Soil and Water Conservation District**

October 2, 2017

[Publish Date]

Employee Name: Current Position:

Reviewer Name: Review period:

Policy originally approved by EMSWCD Board of Directors on: 10/02/17

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The East Multnomah Soil and Water Conservation District’s (EMSWCD’s) Employee Performance Review process and forms consist of the following:

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1.0 Performance Management and Review Process

Performance management and review are meant to help employees satisfy job requirements, demonstrate core competencies and positive work behaviors, identify professional development opportunities, achieve exceptional work quality, and work with board members, volunteers, clients, and other employees in a productive manner. The performance review itself is intended to accurately evaluate each employee’s performance, work behaviors, and professional impression on EMSWCD’s constituents and partners. All employees will be evaluated in a fair, standard and transparent manner.

The performance review instructions and form may change over time to improve the usefulness of the evaluation process. Coaching and, where appropriate, training, will be provided to help employees continue to develop professionally and continually improve their effectiveness and job satisfaction.

The EMSWCD is an at-will employer. That means that both the EMSWCD and the employee can terminate the employment relationship with or without cause and with or without notice. This policy is neither a contract nor a guarantee of continued employment. No Director or staff member has the authority to alter these policies. All changes must be approved by the Board and provided to all employees in writing.

The EMSWCD reserves the right to change these policies and procedures at any time. These policies and procedures do not and are not intended to confer any property right in continued employment or to constitute an expressed or implied contract.

1.1 Continuous Feedback throughout Year

Employee performance review and management should be a continuous process undertaken throughout the entire performance review period, which in most cases will be July through June. To facilitate this:

- All supervisors and their direct reports should strive to create a professional relationship that is founded on open, honest, and frequent communication.
- Performance management begins each year with the establishment of clear and accurate job descriptions, work plans, and professional development and training plans. These documents and the process used to establish them are the cornerstone of success for employees. Being able to understand their roles, expectations, and opportunities, is essential for employees. Job descriptions serve to identify how the employees’ positions fit within the organizational structure. Work plans identify the specific activities and expectations for the next 12 months. And professional development and training plans should identify 1-year, 5-year, and 10-year professional goals (whether inside or outside of EMSWCD) for employees as well as education and training that will help them achieve those goals.
- Supervisors and their direct reports should meet consistently throughout each year (at least one to two times each month) to discuss priorities, issues, needs, and accomplishments related to established annual work plans, new items that were not previously planned for, and job descriptions.
- Supervisors should inform direct reports during these meetings—and at other opportunities as necessary and appropriate—if the employees are performing well. Success should be encouraged, recognized, and praised by supervisors. Lack of success should be addressed by supervisors at the earliest possible time, with steps and a timeline for improvement being determined by the supervisor.



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- To ensure supervisors and direct reports have the same understanding, summary notes from each meeting, which include, at a minimum, decisions, action items, notes regarding the need for improvement and the steps and timeline for improvement, should be captured in an email written by direct reports and sent to the supervisor. Capturing the information correctly may require several iterations between direct reports and supervisors.

The above process is intended to help employees be successful by recognizing good performance and also by identifying and addressing (if needed) performance issues at the earliest possible time. If this process is done correctly throughout the year, employees should know when they are performing well and should rarely find out about performance issues for the first time during the formal annual performance review in July, because they have been consistently kept informed by their supervisor throughout the performance period. The annual performance review should then primarily be used to capture the entire suite of performance-related activities and issues that transpired throughout the year and to establish a longer term path forward. While this is the ideal situation, some circumstances may arise in which employees hear about performance issues for the first time during the annual performance review meeting. While the above measures will be taken to avoid this, on occasion it may be unavoidable. When unavoidable, relevant supervisor comments in Sections 4.0 through 7.0 should clearly indicate as such and provide an explanation as to why the issue or issues were not addressed earlier.

1.2 Annual Discussion and Documentation

The end-of-year annual performance review will be conducted in July-August of each year. The performance review period may be different for new employees (for example if the employees start sometime after the beginning of the standard performance review period), for employees that have formal *Performance Improvement Plans* in place, and as necessary for other employees when circumstances dictate divergence from the standard performance review period. While performance reviews for new employees will use the same format as existing employees, there will normally be an initial formal performance review after six months of service; this may or may not coincide with the annual June performance reviews.

End-of-year performance review steps:

- a. Supervisors should work with their direct reports in June of each year to develop draft work plans and draft professional development and training plans for the following year.
- b. Supervisors should set in-person performance review meeting dates with their direct reports during the month of July, approximately two weeks in advance of the performance review meeting. If requested by direct reports or supervisors, the Executive Director and/or a member of the Personnel Committee may be asked to attend the performance review meetings.
- c. When the performance review meeting is established, supervisors and their direct reports should (re)familiarize themselves with the entirety of the most recent version of the Employee Annual Performance Review form and process.
- d. Prior to the evaluation meetings, supervisors may solicit input from persons with whom their direct reports interact in the course of their work at any time during the performance review period. When Program Supervisors are being evaluated by the Executive Director, the supervisors' direct reports will be given the opportunity to provide input. Persons being requested to comment will



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receive a standard set of questions. All input will be confidential. Comments will be consolidated and summarized. Any identifying information regarding the source will be removed. All consolidated and summarized comments should be sent to the direct report prior to the performance review meeting, with sufficient time to respond to point 6.2.

- e. To help ensure consistency across programs, the Executive Director will send Program Supervisors initial impressions of each staff's performance; if there is substantial disagreement between the Executive Director and the relevant Program Supervisor, the Executive Director and supervisor will discuss/resolve before proceeding.
- f. Prior to the performance review meetings, direct reports should complete Sections 4.0 through 6.0 of the Employee Annual Performance Review form and then send the completed form to their supervisor.
- g. Supervisors should then complete Section 4.0 through 9.0 for the Executive Director's initial review; if there is substantial disagreement between the Executive Director and the relevant Program Supervisor, the Executive Director and supervisor will discuss/resolve before proceeding.
- h. Supervisors will then return the completed form to the direct report. Supervisors and direct reports should describe both positive aspects of performance as well as any areas in need of improvement.

When completing the form, supervisors and direct reports should note that:

- Both supervisors and direct reports should refer to the general and specific indicators when completing their respective sections.
 - If a question does not pertain to an employee, "N/A" should be indicated in the narrative box.
 - Only supervisors should assign performance ratings and performance trends. If this is the first performance review for an employee, "N/A" should be indicated in the Trend box.
- i. Prior to performance review meetings, supervisors and direct reports should separately review the completed Annual Performance Review forms, identifying any areas where there appears to be a difference of opinion.
 - j. Prior to the performance review meetings, supervisors and direct reports should separately review relevant job descriptions, identifying any areas that need updating or changing.
 - k. During the performance review meetings, supervisors and direct reports should:
 - Review all information in the Employee Annual Performance Review form and discuss any difference of opinions;
 - Review draft annual work plans and draft professional development and training plans, discussing desired changes;
 - Review job descriptions and discuss desired changes; and
 - If necessary, discuss elements of *Performance Improvement Plans* that will be put in place.
 - l. After the performance review meetings, supervisors shall finalize the Employee Annual Performance Review forms, annual work plans, professional development and training plans, job descriptions, and, if necessary, *Performance Improvement Plans*. Supervisors shall then send the materials to direct reports for their signature.

The Executive Director will be evaluated by the Board of Directors in executive session after receiving input from staff, partners, peers and clients as appropriate and feasible. The process and form described herein may or may not be used.



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2.0 Description of Performance Rating Standards

The standards and associated descriptions in the table below will be used by supervisors to rate performances of direct reports in: completing the deliverables identified in annual work plans; fulfilling the job duties identified in job descriptions; and the necessary application of education, training, experience, knowledge, skills, and abilities as identified in job descriptions (all of which are collectively hereafter referred to as “tasks”). Each employee’s overall standard as indicated in Section 7.0 will be used to determine a merit-based pay increase.

Standard	Description	% Pay Increase
Exceptional	Met relevant general indicators and more specific positive indicators ~>95% of the time. As a result, for nearly all tasks, the direct report performed at an extremely high professional level and no correction was needed from supervisor or others to be considered complete. Other tasks were <i>Great</i> and/or <i>Good</i> .	3.0%
Great	Met relevant general indicators and more specific positive indicators ~85-95% of the time. As a result, for the vast majority of tasks, the direct report performed at a high professional level and little correction was needed from supervisor or others to be considered complete. Other tasks were <i>Exceptional</i> and/or <i>Good</i> .	2.5%
Good	Met relevant general indicators and more specific positive indicators ~70-85% of the time. As a result, for most tasks, the direct report performed at a professional level and a modest amount of correction was needed from supervisor or others to be considered complete. Other tasks were <i>Exceptional</i> , <i>Good</i> , and/or <i>Fair</i> .	2.0%
Fair	<u>Minimally acceptable/unacceptable level of performance:</u> Met relevant general indicators and more specific positive indicators ~60-70% of the time. As a result, for most tasks, the direct report performed at a subpar level and a large amount of correction was needed from supervisor or others to be considered complete. Other tasks were <i>Exceptional</i> , <i>Great</i> , <i>Good</i> , and/or <i>Poor</i> . NOTE: When a rating of <i>Fair</i> is given for the first time or in isolation of other <i>Fair</i> ratings (i.e., in non-consecutive order), performance is deemed minimally acceptable, a 1.0% raise is possible, and the supervisor will work with the direct report to improve performance. If <i>Fair</i> is given two consecutive times, performance is deemed unacceptable, a 0.0% merit-based increase will be given, and a <i>Performance Improvement Plan</i> will be established; consistent and increasing improvement must occur within six months.	1.0% - 0.0%
Poor	<u>Unacceptable level of performance:</u> Met relevant general indicators and more specific positive indicators ~<60% of the time. As a result, for most tasks, the direct report performed at a subpar level and nearly constant correction was needed from supervisor or others to be considered complete. Other tasks were <i>Exceptional</i> , <i>Great</i> , <i>Good</i> , and/or <i>Fair</i> . A <i>Performance Improvement Plan</i> must be established; immediate improvement must occur for employee to remain in the position.	0.0%



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3.0 Indicators for Section 5.0

5.1 Positive Indicators for Vision and Mission
<ul style="list-style-type: none"> • Identifies strategic issues, opportunities and risks. • Clearly communicates links between the EMSWCD’s strategies and program’s goals. • Generates and communicates compelling conservation-related messages, inspiring others to pursue that same direction. • Conveys enthusiasm about future possibilities.
5.2 Values: Positive Indicators for Equitable Access to Services to all Communities
<ul style="list-style-type: none"> • Works effectively with people from all backgrounds. • Treats all people with dignity and respect. • Shows respect for, and understanding of, diverse points of view and demonstrates this understanding in daily work and decision-making. • Examines own biases and behaviors to avoid stereotypical responses. • Does not discriminate against any individual or group. • Seeks creative means to reach historically marginalized groups.
5.2 Values: Positive Indicators for Public Service
<ul style="list-style-type: none"> • Is responsive and respectful to the public. • Demonstrates professional competence and mastery of subject matter. • Is conscientious and efficient in meeting commitments, observing deadlines and achieving results. • Is motivated by professional rather than personal concerns. • Shows persistence when faced with difficult problems or challenges. • Remains calm in stressful situations.
5.2 Values: Positive Indicators for Transparency
<ul style="list-style-type: none"> • Proactively provides timely, thorough, and accurate information about activities to the EMSWCD, public, partners and others, as appropriate. • Responds to requests for information from the EMSWCD, public, partners and others, in a timely, thorough, and accurate manner. • Develops and maintains accurate, accessible reports/logs of work-related information and activities.
5.2 Values: Positive Indicators for Integrity
<ul style="list-style-type: none"> • Acts without consideration of personal gain. • Resists inappropriate and/or conflicted pressure in decision-making. • Does not abuse power or authority. • Stands by decisions that are in the EMSWCD’s interest even if they are unpopular. • Takes prompt action in cases of unprofessional or unethical behavior. • Honors commitments.
5.2 Values: Positive Indicators for Sound Operations
<ul style="list-style-type: none"> • Allocates appropriate amount of time and resources for completing work. • Foresees risks and allows for contingencies when planning. • Monitors and adjusts plans and actions as necessary. • Uses time efficiently. • Delivers outputs for which one has responsibility within prescribed time, cost and quality standards. • Operates in compliance with organizational regulations and rules. • Supports direct reports, provides oversight and takes responsibility for delegated assignments. • Takes personal responsibility for his/her own shortcomings and those of the work unit, where applicable.



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5.3 Positive Indicators for Deliverables
<ul style="list-style-type: none">• Level of knowledge/skills to meet requirements of the position and evidence of desire to increase that knowledge/skill.• Demonstrates initiative in starting and performing work tasks without direction.• Organizes work to complete projects/tasks in timely manner.• Organizes workload to reflect priorities of program /organization.• Demonstrates flexibility in responding to changing needs and priorities.• Cooperates when asked to perform extra work.• Offers suggestions for improvements in handling work to be done.• Pro-actively identifies potential problems, issues, or obstacles and develops appropriate contingency actions for resolution.• Exercises good judgment in problem solving.• Actions protected and/or improved the EMSWCD's, public's, and environment's interests.• Possesses and uses a level of critical thinking necessary for position.• Provides necessary level of detail in assessments and explanations.• Uses necessary resources, including latest advancements in science and thinking.• Includes appropriate people/entities in decision-making and project activities.• Provides services and deliverables on or before the necessary or prescribed deadline.• Written products include:<ul style="list-style-type: none">○ Proper punctuation, capitalization, sentence structure;○ Logical organization and flow of information;○ Proper formatting, including headers, footers, fonts, numbering; and○ Conformance to templates and branding.

5.4 Positive Indicators for Interpersonal and Communication Skills
<ul style="list-style-type: none">• Ability to communicate well orally and in writing to clients, other employees and volunteers.• Offers and accepts constructive criticism in manner appropriate to reaching program goals and building professional relationships.• Reflects strong motivation and positive attitude.• Works well with clients, professional organizations, public agencies and community groups to achieve program goals.• Presents self in professional manner that reflects positively on the EMSWCD.• Days when employee does not have approval to be tardy or absent are minimal in number.• Represents EMSWCD well, presenting a professional, knowledgeable, and positive appearance and attitude.



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4.0 Contextual Observations

This section is intended to provide context relative to the position and the direct report that will help explain certain conditions that have affected performance, affected the direct report, or both.

4.1 General Overview

Provide general context that will be helpful in understanding performance. Contextual examples include, but are not limited to: duration in current position; unexpected changes to work plan or supervision; unforeseen and unavoidable obstacles; and issues with partners or board.

Employee: ... Supervisor: ...
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4.2 Occasions of Satisfaction

Describe (for the supervisor, what appear to be) the most significant occasions of satisfaction and dissatisfaction since the last performance review and how these contributed to professional and personal growth.

Employee: ... Supervisor: ...
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4.3 Feelings about Job

Describe (for the supervisor, what appear to be) feelings about the job—including workload and work-home balance—and any ideas for improving and enhancing contributions to EMSWCD. For example: does the employee feel challenged; does the employee feel appropriately supported; does the employee see a successful career at this organization?

Employee: ... Supervisor: ...
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4.4 Use of Professional Skills

Describe professional skills, if any, which are not being fully utilized in the current position.

Employee: ... Supervisor: ...
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4.5 Assistance

Describe how the supervisor, Executive Director, the organization at-large, and peers can help with professional success.

Employee: ... Supervisor: ...
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5.0 Key Performance Areas

The key performance areas represent the essential elements of individual success as success in each of these areas indicate that the direct report is helping assure organizational success. Under normal circumstances the key performance areas will be used collectively to determine the overall performance rating in Section 7.0.

5.1 Vision and Mission

The EMSWCD's Vision is that ***Our lands and waters are healthy and sustain forests, farms, wildlife, and communities.*** The EMSWCD's Mission is to ***Help people care for land and water.***

Describe the major role and contributions to the achievement of the Vision and Mission during the performance period.

Employee: ... Supervisor: ...
Performance Rating:
Trend:

5.2 Values

The EMSWCD's Organizational Values are listed below. On a broad level, describe how the employee upheld the values during the performance review period.

- Provide equitable access to services to all communities
- Provide outstanding public service
- Operate in transparency
- Act with integrity
- Utilize sound operations

Employee: ... Supervisor: ...
Performance Rating:
Trend:

5.3 Deliverables

Describe performance in terms of quality, quantity, and timing of deliverables and expectations as identified in the employee's work plan and position description. This should include items of exceptionally good quality, possibly exceeding expectations, if any, as well as those that were of poor quality, not meeting expectations, if any.

Employee: ... Supervisor: ...
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Performance Rating:
Trend:

5.4 Interpersonal and Communication Skills

Describe performance in terms of interpersonal and communication skills that were necessary and appropriate for the position.

Employee: ... Supervisor: ...
Performance Rating:
Trend:

5.5 Supervision and Program Leadership

If the employee being evaluated is a program supervisor or a supervisor of staff in another capacity (such as seasonal or temporary staff), describe performance related to staff supervision and program leadership.

Employee: ... Supervisor: ...
Performance Rating:
Trend:

6.0 Secondary Performance Areas

The secondary performance areas represent supportive elements of individual success. If done well, these areas often will assist staff in being successful in the key performance areas. Under normal circumstances the secondary performance areas will be used collectively as influencing factors when determining the overall performance rating in Section 7.0.

6.1 Professional Development, Education, and Training

Describe performance in terms of quality, quantity, and timing of deliverables and expectations related to professional development activities, education and training as identified in the employee's work plan, position description, professional development and training plan, and as new items during the performance period.

Employee: ... Supervisor: ...
Performance Rating:



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Trend:

6.2 Feedback from Others

Review and respond to formal feedback, if any, received from clients, customers, volunteers, peers, and direct reports, related, but not limited, to communications, outreach, partnerships, and collaborations.

Employee: ... Supervisor: ...
Performance Rating:
Trend:

6.3 Other Comments

Include any other comments regarding performance that were not captured elsewhere.

Employee: ... Supervisor: ...
Performance Rating:
Trend:



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7.0 Summary and Conclusion

Supervisors should use the table immediately below to capture the above performance ratings and trends in one place and to identify the overall performance. The overall performance rating and trend will normally be an average of the individual performance ratings and trends for points 5.1 through 5.5, with points 6.1 through 6.3 being influencing factors. In unusual circumstances, when a one or more points 5.1 through 5.5 clearly dominate performance (positively or negatively), then the overall performance and trend rating may more heavily reflect the more dominant points. An explanation by the supervisor of how the overall rating and trend was determined should be given in the narrative box further below. Supervisors should use the Proposed Salary Increase table to translate the overall performance rating and trend to the proposed salary increase. The expected level of performance is *Good* or better.

Criteria	Rating	Trend
5.1 Vision and Mission		
5.2 Values		
5.3 Deliverables		
5.4 Interpersonal and Communication Skills		
5.5 Supervision and Program Leadership		
6.1 Development, Education, Training		
6.2 Feedback from Others		
6.3 Other Comments		
7.0 Overall Performance *		

* Overall Performance Rating and Trend should be an average of points 5.1-5.5; points 6.1-6.2 will be influencing factors.

Proposed Salary Increase			
X	%	Rating	Trend
	3.0%	Exceptional	Stable or Improved
	2.5%	Great	Stable, Improved, or Declined
	2.0%	Good	Stable, Improved, or Declined
	1.0% - 0.0%	Fair *	Stable, Improved, or Declined
	0.0%	Poor **	Stable or Declined

* A 1% merit-based increase may be given to an employee who receives a *Fair* performance rating only when the most recent prior performance rating was not also *Fair*. If an employee receives a *Fair* performance rating in succession, then the merit-based increase shall be 0%. When a *Fair* performance rating is given in isolation, the supervisor shall give structured improvement guidance to the employee during bi-weekly meetings, at a minimum, over the next six-month period. When a *Fair* rating is given for the second or more consecutive time, a formal *Performance Improvement Plan* must be established in Section 4.0 below.



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** If an employee receives an overall performance rating of *Poor*, a *Performance Improvement Plan* must be established in Section 4.0 below.

Supervisors: Please provide a brief narrative summary and conclusion below.



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8.0 Annual Planning and Position Review

Each year during the annual performance review, supervisors and their direct reports should develop an annual work plan and a professional development and training plan for the upcoming year. Supervisors and their direct reports should also review the direct report's job description to ensure accuracy and to ensure employees continue to be classified correctly. Supervisors should indicate below with an "X," actions taken during this review and complete narratives as appropriate.

Annual work plan completed.

Professional development and training plan completed.

Job description reviewed.

Job description accurate; no changes needed.

Job description out of date; changes needed.

Briefly describe the proposed changes below. The new job description must be approved by the Executive Director.

Reclassification recommended from _____ to _____.

Reclassification recommended from _____ to _____.

Describe the rationale for the proposed reclassification below. All job reclassifications must be approved by the Executive Director.



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9.0 Performance Improvement Planning

A **Performance Improvement Plan** (PIP) is to be established when the employee's overall performance rating is *Fair* (for the second or more consecutive time) or *Poor*. Among other things, the PIP should consolidate in the box below all actions and timelines identified in Sections 4.0 through 6.0 above, if any, that the employee must take to improve performance.

10.0 Signatures

Direct Report: By signing below, the employee verifies that this evaluation has been discussed with them. The employee's signature, however, does not necessarily indicate agreement with the evaluation. The employee may provide additional comments related to the review in the box below and may submit comments to their supervisor and/or the Executive Director within one week for inclusion with this review.

EMPLOYEE COMMENTS:

Direct Report _____ Date _____

Supervisor: By signing below, the supervisor verifies that the prescribed performance review process was followed for this evaluation and that all information provided herein is accurate to the best of their knowledge.

Supervisor _____ Date _____