

How To... Performance Reviews

(To be completed by December 1st of each year)

A good review is one that provides affirmation and direction to your team members. Feedback given in a review should never be a surprise to an employee as we should always be providing our supervisees with regular feedback throughout the year. Below are descriptions of content areas that will be used for you to construct your employees' reviews. Reviews are conducted in November of each year and returned to Human Resources no later than December 1st of each year (unless instructed otherwise). Employees hired after August 1st of each year will be reviewed in the following years review period.

Rating Scale

1. *Unacceptable* – Employee is not performing, or has consistently performed below expectations.
2. *Below Expectations* – Employee is not meeting expectations and requires coaching /direction. All 2 ratings should clearly state an expectation for how the employee should better meet the expectation set forth.
3. *Meets Expectations* – Employee satisfies all requirements of this Strategy/ Skill/ Accountability.
4. *Exceeds Expectations* – The employee goes beyond the expectation set forward. For all 4 ratings, it should be specifically explained how the employee has stepped beyond the expectation set forth.

Accountabilities

List each accountability from the job description. Your comments are required and should be written in a direct, conversational format, with 3-5 sentences expressing how the employee does or does not deliver on that accountability, and rating related to the employees overall contribution to each Accountability.

Skills/Behaviors

Choose skills/behaviors in which the employee has not yet mastered and you have specific feedback for them to improve as well as skills/behaviors that your employee has mastered that add to the greater effectiveness of your team. Write 2-3 sentences regarding each skill/behavior and provide a rating. Additional skills and behaviors may be chosen from the table below if you need more than what is encompassed in this section of the job description.

Examples of skills/behaviors that could be used

Leadership	Administrative	Cognitive	Occupational	Motivation	Adaptation	Communication	Interpersonal
Motivating Others	Planning	Perceptiveness	Job Knowledge	Drive	Confidence	Informing	Human Relations
Group Skills	Organizing	Decision Making	Functional Area Knowledge	Urgency	Flexibility	Oral Communication	Public Relations
Delegating	Time Mgt	Quantitative/ Financial Skills	Organizational Practices	Persistence	Balance	Listening	Conflict Management
Coaching	Attn to Detail	Innovation	Industry Practices	Commitment	Stress Management	Written Communication	Intuitive ability

Key Strategies

Each employee at JFS has a responsibility to deliver on the goals of the JFS Strategic Plan. Choose three of the five key strategies listed below and provide 2-3 sentences regarding what the reviewed staff member has done or could do to move that strategy forward while acting within their role at the agency. Provide a rating related to the review given for each chosen strategy

Organizational Culture

- Define what it means for JFS to be a Jewish organization and the evolving implications on policies and practices.
- Enhance and expand the agency-wide quality improvement plan that applies outcome-based standards to all JFS services and operations.
- Develop the culture of respect, communication, shared commitment and mutual accountability to our team and mission.

Service Delivery

- Determine the process for JFS to identify, evaluate and develop new programmatic opportunities.
- Expand the capacity and solidify the identity of JFS as the premier provider of comprehensive aging-in-place services.
- Understand and identify the opportunities to serve the needs of the expanding Jewish interfaith families.
- Define and organize the structure of major service categories of JFS.

Marketing

Create and implement a strategic marketing plan to establish a recognizable and cohesive JFS brand.

Philanthropy

Build upon the culture of philanthropy throughout JFS.

Collaborations

- Strengthen our understanding to better meet the needs of the Orthodox community.
- Reach out and engage young adults and families.
- Identify our role and implement a plan for integrated healthcare.
- Identify and optimize existing and new strategic relationships.

Full Review Summary

The review summary should be one paragraph that summarizes the entire review, good and bad. It should maintain a positive tone, but address concerns that extend into the next review period. The overall rating will automatically average.

Mid-Year Progress List/Report

Once per year (in June) each supervisor will incorporate a formal mid-year progress report meeting into their standard supervision time. During this time the progress report form will include each item within that appears on the Mid-Year Progress List which received below a (3) Meets Expectations rating. This process allows the supervisor to express any progress made toward meeting expectations, modify feedback given in the review and set course for the employee to be able to meet expectation within the next review period. The Chief Talent Officer will be present to provide insight and resources for performance improvement.

Employee Comments and Signatures

Employees can use this space to express any dissent, or feedback they have related to your evaluation. It remains with the review so that others can consider their comments in the future; however it does not alter or negate an evaluation from a supervisor. All reviews must be reviewed/ signed by HR prior to being delivered to staff and signed off by the supervisor and employee once delivered.