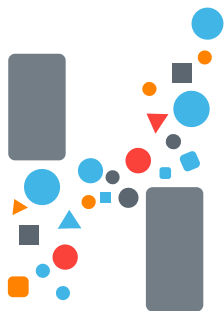


2021

Headwaters Foundation Employee Performance Review Process



**Headwaters
Foundation**
BE THE SOURCE OF CHANGE



Below is the process Headwaters Foundation uses for employee performance review. The documents we use throughout the process follow. If you would like the editable version of any of these documents or have any questions, reach out to evaluation@headwatersmt.org.

- The employee review process starts by each staff person setting yearly goals and deliverables that are connected to the organization's mission and strategy.
- Each staff person works with their supervisor to finalize and approve their yearly goals and deliverables. These goals and deliverables are then entered into the employee's performance review form.
- Each employee meets quarterly with their supervisor to check in on progress related to goals and deliverables. These conversations give real time feedback to employees, rather than waiting to hear feedback at the end of the year. Quarterly conversations also allow employees to understand how they are doing and make any course corrections to their work in order to have a good performance rating at the end of the year.
- During the first two weeks of November, each staff person completes their employee performance review form. During the same time period, their supervisors also completes the performance review rating sheet for their supervisees. If the employee is a supervisor, their direct report also completes a rating of their supervisor. Each employee and their supervisor meet in mid-November to discuss the self-rating and the supervisor rating (and direct report rating, if applicable). This conversation gives employees a chance to provide input into the final rating process. After this conversation, each supervisor adjusts (if necessary) and finalizes their employee's rating sheet.
- The supervisor then submits a pay adjustment based on the employee's rating and submits that via the pay scale adjustment form. All employees can be considered for COLA increases if applicable. Any additional increases are merit increases based on performance rating.
- The CEO receives all of the rating and pay adjustments and makes any necessary changes to rating and pay adjustments, looking at equity and consistency across the organization.
- CEO and supervisors finalize ratings and pay increases for the next year. The supervisor then sits and communicates final rating and pay changes with each of their direct reports. This is all completed by December 15th so that pay changes can become effective in the new year. This conversation includes areas for professional development and growth. Each staff person is asked to submit professional development forms by the end of the year. Professional development goals are included in the next year's performance review process.
- In late November and December, staff start working on drafting their new year goals and deliverables so the process can start all over in the new year.

Your Name here DEVELOPMENT PLAN DASHBOARD

Goals:

- 1.
- 2.

Training Needed:

- 1.
- 2.
- 3.

Estimated Total Cost: \$0.00

Action Plan	Annually											
	Q1			Q2			Q3			Q4		
	J	F	M	A	M	J	J	A	S	O	N	D

Course or Workshop	Cost												
Describe the course of workshop	\$0.00	Q1	Q2	Q3	Q4								
Conference (s)													
Describe the conference and how it aligns to the goals	\$0.00	Q1	Q2	Q3	Q4								
Self-Development (research or reading)													
Describe the activities or books you are using	\$0.00	Q1	Q2	Q3	Q4								
Coaching or Mentoring													
Describe the coaching activities	\$0.00	Q1	Q2	Q3	Q4								
Job Shadowing													
Describe this activity	\$0.00	Q1	Q2	Q3	Q4								
Project Work													
Describe this activity	\$0.00	Q1	Q2	Q3	Q4								
Committee/association membership													
Describe this activity	\$0.00	Q1	Q2	Q3	Q4								
Other													
	\$0.00	Q1	Q2	Q3	Q4								

= Completed

Manager Notes:

- 1.
- 2.

Headwaters Foundation

November 2020

Performance scoring

Performance					
Score	%Cola	Above 3 to 3.49	3.5 to 3.99	4 or above	Total potential
% increase	2%	1%	1%	1%	5%

Name	Supervisor Score	Current Salary	2020 COLA	Performance %	Adjustment	Total	Total COLA \$	Total Merit \$	Total Adjustment	New Salary 2021
Mary	3.9	\$10,000	2.0%	2.0%	0.0%	4.0%	\$200	\$200	\$0	\$10,400
Suzy	3.1	\$10,000	2.0%	1.0%	7.6%	10.6%	\$200	\$100	\$760	\$11,060
Karen	2.5	\$10,000	2.0%	0.0%	0.0%	2.0%	\$200	\$0	\$0	\$10,200
John	n/a	\$10,000				0.0%	\$0	\$0	\$0	\$10,000
Sarah	n/a	\$10,000				0.0%	\$0	\$0	\$0	\$10,000
TOTAL							\$600	\$300	\$760	\$51,660

Total Increases \$1,660

Total Budgeted \$13,660

Variance \$12,000