2021

Headwaters Foundation

Employee Performance Review Process
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 complete 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.
1. Goals: Insert Goals and quarterly deliverables (including goals and deliverables in which you play a crucial, but not lead, role). You should add a line for each goal you are working towards. You should list all your deliverables under the relevant goal line.

2. Living Organizational Norms: We start from a place of trust. We lead with love, empathy, and a sense of community. We are humble, generous, and open-hearted. We are accountable and inclusive. We make magic with the gifts we have. We are able to work hard because we take time to play, create, and be with our people. We take risks and when we fail we learn and do better.

3. Service Focus/Customer Service: Values and demonstrate the importance of delivering high quality service using organizational norms and values to internal and external partners.

4. Dependability: Internal and external partners can depend on high quality service that is on time and exceeds expectations. Demonstrates flexibility in order to obtain desired goals. Engaged and prepared to be fully present in their work day.

5. Please provide comments for any of the evaluation points listed above.

6. Accomplishments: Please provide 2-3 specific examples of your accomplishments over the last review period.

7. Goals: Please provide 2-3 specific examples of goals you wish to achieve or areas for improvement to address.

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Additional information can be provided in questions #5-7.

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Weighted Average Performance Appraisal Score (Average from Performance Appraisal above)

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

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All Employees

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Headwaters Foundation Employee Evaluation Form

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Headwaters Foundation

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Additional information can be provided in questions #5-7.

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Weighted Average Performance Appraisal Score (Average from Performance Appraisal above)

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

Employee Comments

Reviewer Comments

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All Employees
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<tr>
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<th>Annually</th>
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Manager Notes:
1. 
2.
# Headwaters Foundation

## November 2020

### Performance scoring

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<tr>
<th>Name</th>
<th>Supervisor</th>
<th>Score</th>
<th>Current Salary</th>
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<th>Total Merit $</th>
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**Total Increases**: $1,660

**Total Budgeted**: $13,660

**Variance**: $12,000