Human Resources

# PERFORMANCE MANAGEMENT

## Managing Your Team Member's Performance Review

April 2026

performance@yourorg.org

# Agenda

- Year-End Performance Review Timeline
- Year-End Review Process
- Performance Ratings/Guidance
- Performance Evaluations and Feedback Discussions
- Promotion Process Overview
- Managing Year-End Reviews in PerformYard

# Performance Management Cycle

## GOAL SETTING &
90 DAY REVIEW

Review: Set, align goals, and define SMART metrics




## MID-YEAR
REVIEW

Track progress during Mid-year and mitigate obstacles

## COMPENSATION PLANNING
CYCLE

Give recognition and reward performance

## ANNUAL
REVIEW

Assess final results and complete Annual Review to determine performance rating

# FY25 Year-End Performance Review Timeline

Manager Assessment Period

**April 27 – May 15**

Executive Leadership Review Period

**June 1 – June 19**

Year-End Performance Discussions Period

**June 29 – July 8**




**April 6 – April 24**

Team Member Self Assessment Period

**May 15**

Manager Assessment Period Ends
Preliminary Ratings Due
Promotion Recommendations Due

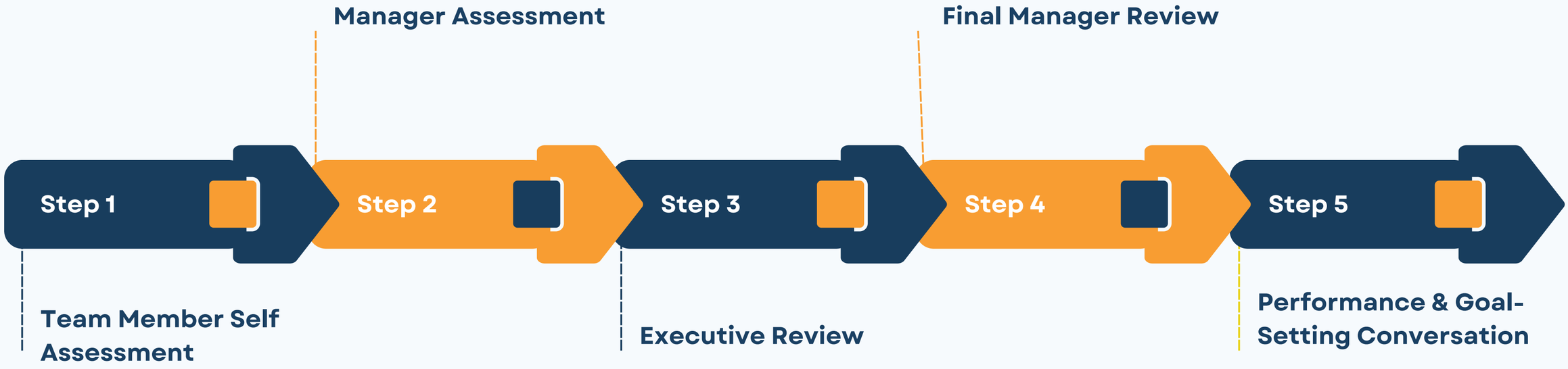
**June 19**

Deadline for ratings changes in PerformYard

**Aug 10-Sep 4**

FY26 Goal-Setting Period

# The Year-End Performance Review Cycle provides opportunity for managers to assess team performance annually




Self-assessments and manager assessments are mandatory to evaluate performance and set compensation.

# PERFORMANCE RATINGS SCALE

| | Rating | Description | Guidance |
|---|---|---|---|
| | Exceeds | Performance clearly exceeds in all areas. Consistently goes well beyond the scope of the position and attains exceptional results | Stands out as a major contributor and a highly valued Team Member. Work has signifcant impact across departments. Demonstrates strong collaboration with the ability to drive meaningful results. Cross-functional contributions enhance efficiency, improve teamwork and create lasting organizational benefits. |
| | Meets Plus | Performance is consistently beyond expectations. | This Team Member consistently delivers high quality results and takes initiative in their work. Collaborates effectively across functions within their department and demonstrates a proactive approach to problem-solving. Consistently shows a commitment to excellence. |
| | Meets | Performance met all major expectations. | Overall this Team Member successfully achieved their goals and exceeded expectations in some areas. Strong and reliable performer who consistently delivers solid results. |
| | Meets Minus | Performance sometimes meets expectations. | Sometimes attains acceptable results but did not meet all goals. Needs improvement in one or more areas. |
| | Below Plan | Performance did not meet expectations, but the Team Member performed according to plan in a few areas. | Performance lacks consistency and must improve in one or more areas. |
| | Too New To Rate | Includes any new hires who joined after October 1 of the performance year | New hires who joined after October 1 should not be provided with a year-end performance assessment but should instead engage in goal review discussions. |

# Ratings Scale Allows for Logical Performance Groupings

| Rating | Description |
|---|---|
| Exceeds | Performance clearly exceeds in all areas. |
| Meets Plus | Performance is consistently beyond expectations. |
| Meets | Performance met all major expectations. |
| Meets Minus | Performance sometimes meets expectations. |
| Too New To Rate | Includes any new hires who joined after October 1 |

High Performers

Solid Performers

Low Performers

- **Not Eligible for Promotion**
- **Meets Minus: Eligible for merit/bonus**
- **Below Plan: Not Eligible for merit/bonus**

# MANAGING TEAM MEMBER EVALUATIONS

# Writing Effective Evaluations



## Base

Base performance evaluations on facts, data, and observable behavior



## Use

Use specific examples to support ratings and feedback



## Avoid

Avoid generalizations, assumptions, and personal biases



## Consider

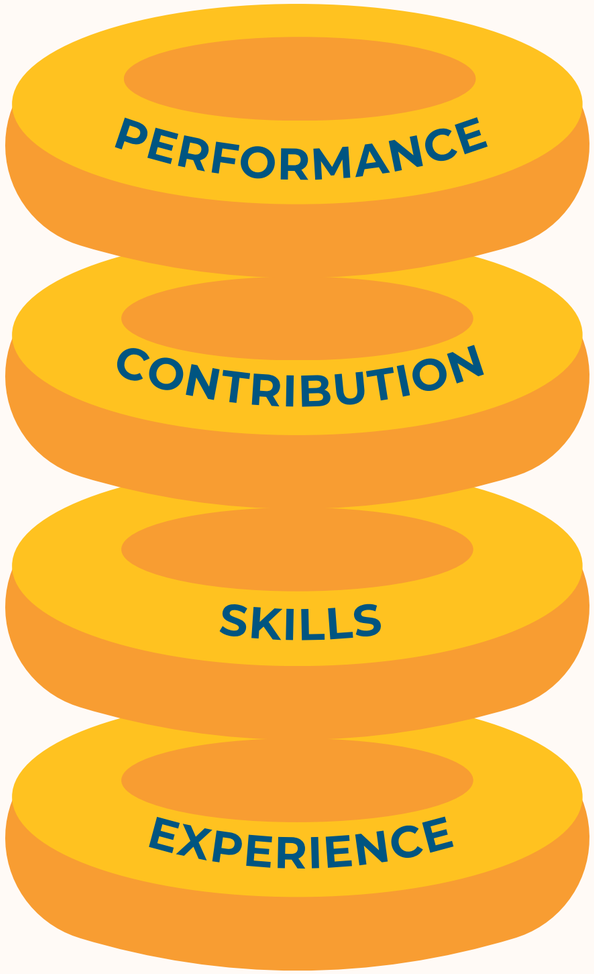
Consider both team member achievements and areas for development



## Highlight

Use a balanced approach – highlight strengths while addressing growth areas

# Evaluating “Exceeds” & “Meets Plus” Rated Employees




## PERFORMANCE AGAINST GOALS

- How well does the team member meet and exceed the expectations and goals that you have communicated?

## CONTRIBUTION TO THE TEAM/DEPARTMENT RELATIVE TO PEERS

- What is the impact of the team member’s contribution to the overall work product? To the team?
- What positive outcomes for the department can be attributed to the skill the employee demonstrates?
- How does this team member’s contribution level compare to others in the department?
- What would be the impact to the department success if this team member moved from their current position?

## CRITICAL SKILLS AND COMPETENCIES

Does the team member have key skills that are critical to success of the department and how is the team member utilizing these skills to impact the success of the team?

## EXPERIENCE & GROWTH POTENTIAL

- How has the team member grown in skills and competencies during the time in the current job?
- Does the team member seek to continually acquire new skills, experiences, and competencies regardless of job?

# Evaluating “Meets” Rated Employees

| | | | |
|---|---|---|---|
| **Performance Against Goals** | Does the team member consistently achieve the goals and targets set for their role? | How effectively does the employee manage their workload and deadlines? | Are they proactive in identifying and solving problems related to their work? |
| **Contribution to Team/Dept Relative to Peers** | Does the team member collaborate effectively with colleagues and contribute to a positive team culture? | How does their level of effort and engagement compare to peers in similar positions? | Are they reliable and accountable when working on team projects? |
| **Critical Skills** | Do they continuously seek to improve their skills and stay updated on industry trends? | Are they able to work independently and make sound decisions within their role? | How well do they communicate with team members, managers, and other stakeholders? |
| **Experience and Growth Potential** | Has the team member demonstrated growth or improvement in their role over time? | Do they show interest in career progression within the organization? | How well do they handle increased responsibilities when given the opportunity? |

# Evaluating “Meets Minus” & “Below Plan” Rated Team Members

## EVALUATING “MEETS MINUS” & “BELOW PLAN” RATED TEAM MEMBERS

Team member should NOT be surprised at year-end rating as they should have received feedback during mid-year review that clearly indicated underperformance

Provide clear, tangible examples of performance that has not met expectations

Refer to previous feedback discussions regarding team member’s performance

Any rating below a “Meets” must accompany a development plan with clear written review stating areas for improvement with guidance to employee of expected behaviors

Provide clear, facts regarding team member’s performance

Follow up discussion with team member must take place as soon as possible and provides guidance to employee of expected behaviors

**If you have a direct report who will receive a “Meets Minus” or “Below Plan”rating , please reach out to your HR Leader as soon as possible.**

# MANAGING EMPLOYEE FEEDBACK

# Conducting Performance Evaluation Meetings



### Prepare in Advance

Review notes, past performance, and team member's self-assessment

### Start on a Positive Note

Recognize accomplishments and contributions

### Discuss Strengths & Areas for Improvement

Provide clear, actionable feedback

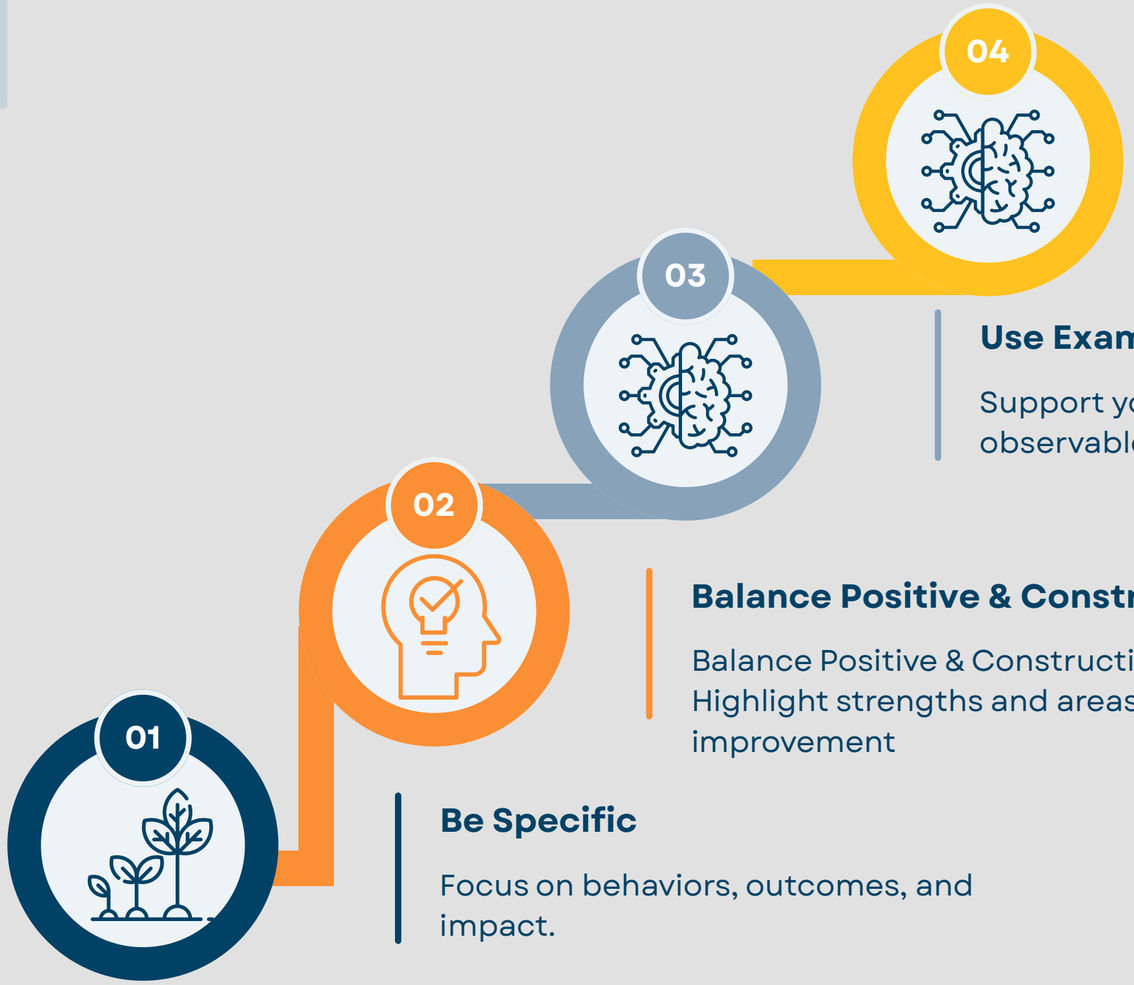
### Encourage Team Member Input

Allow team members to share their perspective

### End with Next Steps

Discuss goals and professional development

# Providing Effective Feedback




**Be Specific**

Focus on behaviors, outcomes, and impact.

**Balance Positive & Constructive Feedback**

Balance Positive & Constructive Feedback: Highlight strengths and areas for improvement

**Use Examples**

Support your feedback with clear, observable instances.

**Focus on Solutions**

Support your feedback with clear, observable instances.

# Performance Phrases Examples

| Positive Feedback | Constructive Feedback |
| --- | --- |
| You have an exceptional ability to grasp complex concepts quickly and apply them effectively in your work. | Premium pricing positions product as exclusive within market |
| Your excellent attendance reflects your professionalism and commitment to your role and the team. | Innovative features attract tech-savvy and trend-driven customers |
| Your proactive approach in planning and managing your time reflects your strong organizational skills. | Moderate service level risks losing customers to faster rivals |
| You demonstrate strong leadership qualities by consistently guiding your team members towards achieving their goals. | Global reach expands recognition and influence across multiple regions |

***Reference:*** *"PerformYard-100 Performance Review Phrases" in PerformYard under Resources tab*

# SETTING GOALS FOR THE NEXT PERFORMANCE CYCLE

# PROMOTION PROCESS

# Promotion Request Process

## Business Case

Manager provides business case for promotion in the performance evaluation and obtain appropriate senior leader approval.



## Promotion Request Form

Manager prepares Job Description for the new role and completes Promotion Request Form

## Approval

HR reviews documentation and provides approval

**Deadline to submit a recommendation is May 15, 2026.**

PerformYard

# Step-by-Step Instructions for Year-End Reviews

# Save The Dates

**Manager**
**Perform Yard**
**Trainings**



**Manager Only**

April 8th 2:00-3:00pm EST
April 9th 12:00-1:00pm EST

**Calendar invitations to follow**

# APPENDIX