Human Resources

PERFORMANCE MANAGEMENT

Managing Your Year End Review

April 2026

performance@yourorg.org

Agenda

- Year-End Performance Review Cycle
- Year-End Performance Review Timeline
- Completing Your Self-Assessment
- Performance Ratings/Guidance
- Performance Discussions and Feedback
- 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

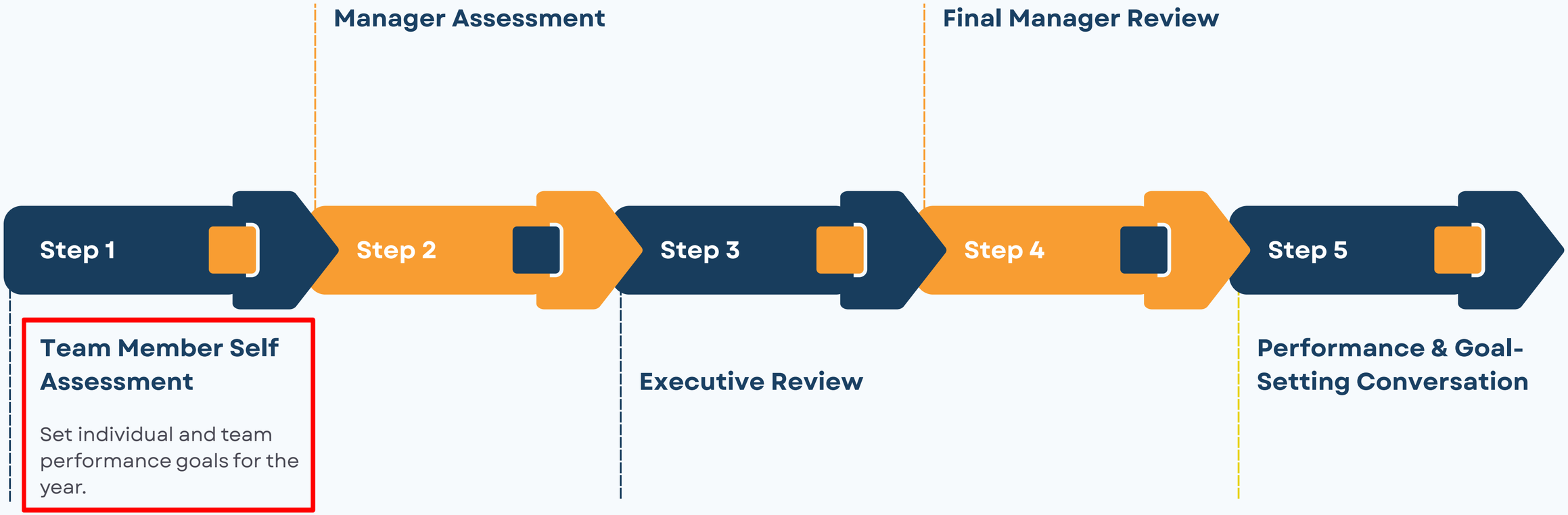
Deadline for ratings changes in PerformYard

Aug 10-Sep 4

FY26 Goal-Setting Period

Team Member Self-Assessment

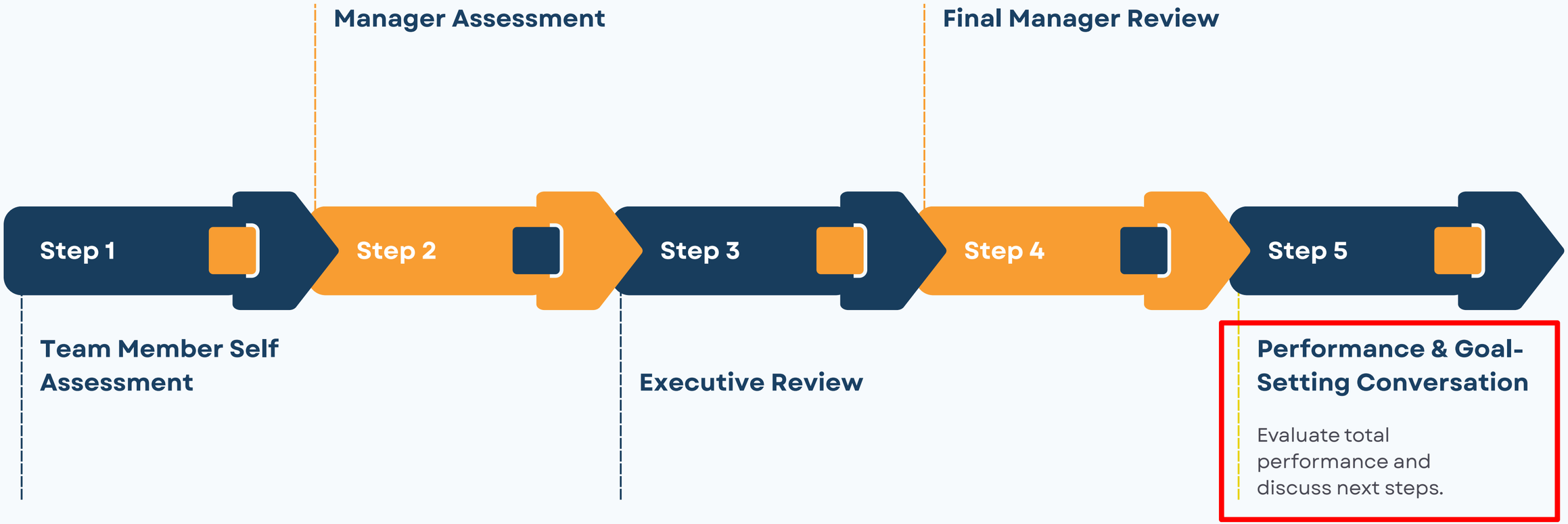
Self-assessments and manager assessments are required to rate performance and determine compensation.



- **Team Members complete their Performance Review in PerformYard by April 24th** to include:
  - Goal accomplishments
  - Demonstrated strengths
  - Areas for improvement

- Once completed, Team Member sends form to Manager by clicking **“Submit”.**

Performance & Goal-Setting Conversation



- **Managers and Team Members engage in Year-End Performance Conversations held beginning June 29 and should conclude by July 8th**
- **FY27 Goal-setting discussions begin August 10th.**
- **Team Members should update their FY27 Goal-Setting Form in PerformYard to reflect discussions with Manager by September 4th**

COMPLETING YOUR SELF ASSESSMENT

Team Member Self-Assessment

01

Be Honest & Reflective

Highlight your achievements and challenges



02

Use Examples

Use specific examples to showcase your contributions



03

Align with Goals

Align your achievements with department goals



04

Identify

Identify your areas for improvement and professional development



05

Keep it Simple

Keep it clear, concise, and data-driven



UNDERSTANDING PERFORMANCE RATINGS

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.
	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.

PERFORMANCE DISCUSSIONS & NEXT STEPS

Preparing For Your Performance Discussion



Step 01

Review

Review Your Self-Assessment
Be ready to discuss key contributions



Step 02

Anticipate

Anticipate Questions & Feedback
Think about areas of improvement



Step 03

Engage

Engage in Career Growth Discussions
Ask about learning & development opportunities

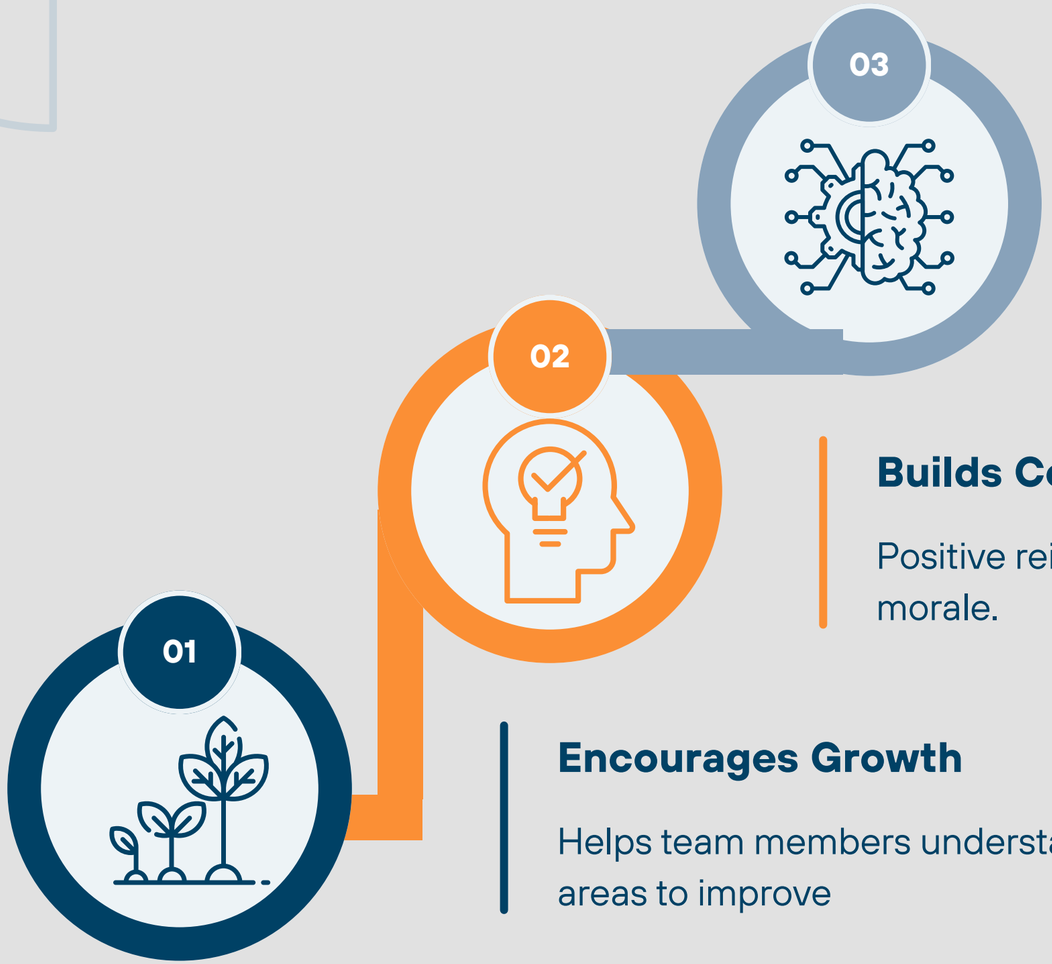


Step 04

Remain

Remain Open & Professional
Stay engaged and take notes

The Importance of Feedback



Fosters Development

Constructive feedback identifies skills to build or refine.

Builds Confidence

Positive reinforcement motivates and boosts morale.

Encourages Growth

Helps team members understand strengths and areas to improve

Tips For Receiving Feedback

01

Be Open Minded

feedback is an opportunity for growth & development



02

Ask Questions

Take notes:
Clarify points and seek examples if needed.



03

Reflect & Act

Consider how to apply feedback to improve performance



GOAL SETTING FOR THE NEXT PERFORMANCE CYCLE



01

Specific Goals

State objectives clearly and precisely for easier understanding, focus, and direction

02

Measurable Steps

Trackable milestones provide concrete evidence of ongoing achievement and consistent progress

03

Achievable Targets

Ensure goals realistically match ability, skills, and available resources for success

04

Time-Bound Plans

Set clear deadlines to maintain momentum, accountability, and structured overall progress

What Happens After Your Performance Discussion?

01

Finalization of Evaluations

All reviews are documented in PerformYard



02

Compensation & Promotion Discussions

Decisions may be influenced by evaluations



03

Goal Setting Discussions

Work with your manager to set goals for the next cycle



04

Ongoing Feedback & Check-Ins

Performance discussions shouldn't stop after the review!



Next Steps

April 6th - April 24th

Team Members complete year-end review form in PerformYard showing goal achievement

01

April 27th - May 15th

Managers review Team Members' performance and achievements and SAVE in PerformYard

02

June 29th - July 8th

Managers and Team Members engage in year-end performance discussions.

03

August 10th - September 4th

FY26 goal-setting discussions occur and submitted in PerformYard

04

Save The Dates

Team Member
Perform Yard
Trainings



Team Member
Working Session



Team Member

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

April 16th 2:00-3:00pm EST

Calendar invitations to follow

Human Resources

THANK YOU

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