



**POLICY ON
STAFF REVIEW
AND
DEVELOPMENT**

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STAFF PERFORMANCE REVIEW POLICY

Our employee performance review policy describes how we coach, evaluate and reward employees. We base our performance management systems on constructive feedback and open communication between managers and team members.

Scope

This policy applies to all employees. We will clarify our performance appraisal process and provide guidelines for managers on how to lead their teams and assess employee performance.

- We have built our performance management practices to:
- Ensure you understand your job responsibilities and have specific goals to meet.
- Provide you with actionable and timely work feedback.
- Invest in development opportunities that help you grow professionally.
- Recognize and reward your work in financial or non-financial ways (e.g. awards.)

Policy elements

What is good performance?

Our organization has a general definition of what good performance looks like. To achieve a good performance evaluation, you should:

- Meet your targets consistently.
- Complete your job duties as expected.
- Show a willingness to learn and develop.
- Follow our Code of Conduct and other organization policies.
- Have a good attitude and collaborate well with your colleagues.

Each employee may excel in one aspect and need improvement in another. But, to remain employed with our organization, you should meet a minimum standard for all of these aspects and show a willingness to improve where appropriate.

Periodical reviews

We conduct [annual/ bi-annual/ quarterly] performance reviews. During these reviews, your manager will fill out your performance evaluation report through our [performance review platform] and arrange a meeting with you to discuss your review. Through these discussions, managers aim to:

- Recognize employees who are good at their jobs.
- Talk about career moves and employee motivations.
- Identify areas of improvement.

Periodical reviews apply to employees who have completed their onboarding period.

Rewards

Pay increases or bonuses aren't guaranteed. But, we encourage managers to recommend rewards for their team members when they deserve them. There won't be any forced ranking or other comparison between employees, as our goal is to help all employees improve and develop their careers.

Training

Training and development opportunities are available for all employees year long. But, if managers identify a team member's training needs in a specific area, they can discuss this with their team member during performance reviews. That way, they can set up an improvement plan.

On-the-job training, job shadowing and other training methods are also appropriate when managers intend to promote an employee in the near future. We encourage managers to discuss future career moves with their team members, so they can determine what type of training is appropriate.

Frequent communication

Managers should meet with their team members once per [week] to provide feedback and talk about their work and motivations. This way, team members can receive feedback in a timely manner and avoid surprises during their [annual/ bi-annual/ quarterly] performance review.

During performance meetings, both parties should feel free to discuss any concerns they have. If you need to talk to your manager about a particular issue, reach out as soon as possible.

Managers' responsibilities

If you manage a team, you are responsible for your team members' performance. To conduct effective regular meetings and performance evaluations, we expect you to:

- Set clear objectives. Your team members should know what you expect of them. When you first hire someone to your team, ensure they understand their job duties. Set specific goals for each team member (and team-wide if applicable.) Renew those goals during [annual/ bi-annual/ quarterly] performance reviews.
- Provide useful feedback. During scheduled meetings with your team members, give them guidance and praise, as appropriate. Be fair and specific to help them understand and implement your feedback.
- Keep your team members involved. There should be two-way communication between you and your team. Make your expectations clear, but always take your team members' motivations and aspirations into account. Discuss training and development opportunities that may interest your team members.
- Keep logs with important incidents about each one of your team members. These logs help you evaluate your team, but they may also prove useful if you want to terminate, reward or promote your team members.

G.O.O.D. PERFORMANCE REVIEW

PURPOSE

Use this template to help guide an effective one-on-one conversation.

Goals:

- What long-term goals have we agreed to?
- How have things gone since we last spoke?
- What are our plans until next time?

Obstacles:

- What's standing in your way?
- What have I noticed getting in your way?
- What can I do to help? What can you do?

Opportunities:

- What are you proud of that people don't know about?
- Do you feel you're growing toward where you want to be?
- What could we do to make this your dream job?

Decisions:

- What actions will you take before next time?
- What actions will I take before next time?
- What others big decisions did we make?

G.O.O.D. Feedback is:

Specific

Can you give me an example?

Frequent

Wish I'd known this sooner.

Outcome-Focused

Why does this matter?

Positive

What am I doing well?

Conversational

When do I get to talk?



360 PERFORMANCE REVIEW

PURPOSE

Use this sample template to gather feedback from the people that your employees work with every day for a diverse set of data.

Note: A 360 typically looks at several core concepts such as those related to performance, accountability, trust and respect, upholding company values, and more. This is example content to get you started.

Good:

Employees receive feedback from coworkers on their team and their manager.

Best:

Employees give and receive feedback to employees across teams, departments, and levels.

Performance

Self: On a scale of 1-5, rate your ability to hold others accountable.

Peer: On a scale of 1-5, rate [employee's] ability to meet the goals he/she set.

Open-ended: Tell me about a time when [employee] held others accountable for desired results.

Accountability

Self: On a scale of 1-5, rate your ability to bring energy to the workplace.

Peer: On a scale of 1-5, rate the level of energy that [employee] brings to the workplace.

Open-ended: Is [employee] more likely to use intrinsic or extrinsic motivations?



ANNUAL PERFORMANCE REVIEW

PURPOSE

Use this template as a guide for discussing performance over the past year. Find out what personal and professional goals employees would like to prioritize and build out a plan for the future.

Reflect on the past:

- What were the highlights of your year?
- What did not go well this year?

Make a plan:

- What personal goals should we set for this year?
- What professional goals should we set for this year?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

Look to the future:

- What performance impact(s) can I make moving forward?
- How do you see your personal goals aligning with team goals and the organization's mission?

Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.



BEHAVIOR CHANGE

PURPOSE

Use this template to find out what behaviors are enhancing or detracting from performance.

Questions to ask:

- What behaviors do you bring to your work and to the team that have a positive impact?
- What skills or behaviors would you like to improve or refine?
- What steps can you take in order to improve or refine these behaviors?

Good:

Managers address past issues and provide feedback for how to improve.

Best:

Managers and employees discuss past issues, identify needs, attempt to remove barriers, and create a joint plan to improve.



GOAL SETTING CONVERSATION

PURPOSE

Use this template to discuss development of an employee's monthly, quarterly, or annual goals.

Reflect on the past:

- Share some highlights from last month/quarter/year.
- What accomplishment are you most proud of so far?
- What other projects or tasks would you like to work on?

Make a plan:

- What are your goals for the upcoming month/quarter/year?
- What inspired these goals?
- What can you start/stop/keep doing to reach your goals?

Address alignment:

- Do you feel your short- or long-term goals are attainable and realistic?
- Who here do you lean on to help set short- or long-term goals?
- How can you contribute to other projects or tasks for which our team is responsible?

Good:

Managers determine and share goals for employees to meet in the upcoming year.

Best:

Managers and employees discuss goal opportunities together and create a plan to achieve them as a unit.



MID-YEAR PERFORMANCE REVIEW

PURPOSE

Use this template to layout the topics of discussion for mid-year performance conversations.

Reflect on the past:

- What were the highlights of your year so far?
- What did not go well in the last 6 months?
- How have things gone since we last spoke?

Make a plan:

- What would make the next 180 days successful for you?
- What kind of support do you need to achieve your goals?
- How will you measure or track your progress on these goals?
- What steps will you take to attain these goals?

Look to the future:

- What are your goals for the rest of this year?
- What can you do to positively impact your performance in the next 6 months?
- What can you do to positively impact your performance toward your ideal role?
- Do you understand how your personal goals align with team goals?

Good:

Managers reflect on past performance, provide suggestions, and end with a summary of the meeting.

Best:

Employees and managers review performance, collaboratively discuss action plans, and look to the future.



PEER REVIEW

PURPOSE

Use this template to provide employees with an opportunity to give and receive constructive peer-to-peer feedback.

Project execution:

- How are your projects or tasks going?
- How are you prioritizing your projects or tasks?
- How will you ensure your projects and tasks are completed on time?

Role fit and strengths:

- What ideas do you have about how we can match your talent to responsibilities?
- What qualities do you look for in a mentor?
- Is there anyone in our organization you'd like as a mentor?

Team and collaboration:

- How can you increase trust with your coworkers?
- What do you expect from your coworkers?
- How can your coworkers count on you?

PERFORMANCE IMPROVEMENT

PURPOSE

Use this template to discover what's hindering top performance and create a plan to improve it.

Address accountability:

- How did you perform on your goals?
- What resources would have been helpful in achieving your goals?
- How can I help keep you accountable for achieving goals and results?
- How will you keep yourself accountable for meeting goals, deadlines, and results?
- How are you being efficient or inefficient with your time?

Make a plan:

- Include specific objectives and key results that will lead to reaching your goal(s).
Make sure to include due dates for each OKR or SMART goal to keep on track.
- Discuss goal progress with your manager or a mentor.
If you encounter a barrier to achieving your goal, ask for help in removing or working around the barrier.

Reflect:

- What is a recent situation you wish you had handled differently?
- What would you have changed?
- What are other situations you can use these strengths?

Good:

Managers reflect on performance and provide feedback to improve.

Best:

Managers and employees discuss opportunities for growth and coach to be successful together.



PROFESSIONAL DEVELOPMENT

PURPOSE

Use this template to understand how an employee's skills and strengths align with their role. Then discuss their goals and what steps they will need to take to reach their goals.

Address alignment:

- Which of your strengths are underutilized in your current role?
- What are your current career priorities and goals that most excite you?
- How do you think this job aligns with your personal values?

Discuss development:

- What barriers or hurdles exist to achieving your professional goals?
- Are there any learning opportunities that you would like to participate in?
- What can you start/stop/keep doing to help you reach your professional goals?

Talk through training and goals:

- What new or improved skills would help you be more effective in your role?
- What new or improved skills would help you be more efficient in your role?
- What skills are needed to reach your long- and short-term goals?

Good:

Goals are primarily focused on professional growth within the year.

Best:

Goals are focused on personal and professional growth over the next 3-5 years.



SELF-ASSESSMENT

PURPOSE

Use this template to help employees understand their performance and discover barriers to, or opportunities for, success and growth.

Questions to ask:

- In what ways can you improve your performance?
- What actions are needed to support the improvement?
- What barriers or hurdles exist to improving your performance?
- What metrics/milestones can we use to make sure you're on track?
- How will you hold yourself accountable for achieving goals and results?

Examples of good performance:

- 1.
- 2.
- 3.

Examples of poor performance:

- 1.
- 2.
- 3.

Feedback from others:

- 1.
- 2.
- 3.



SIMPLE 1-ON-1 PROGRESS CHECK

PURPOSE

Use this template to facilitate a discussion on performance on goal progress.

Before:

- What's top of mind for you since our last check-in?
- How's the project/task/goal going?
- Do you have any existing or anticipated roadblocks or challenges we should discuss?

During:

This section is a list of suggested follow-up prompts to guide what comes up during the check-in.

- | | |
|---------------------|--|
| 1. Update | Is this still in alignment with you meeting your goals/objectives? |
| 2. Learned | How did you apply what you learned? |
| 3. Roadblock | Do you have (or need help with) ideas to accomplish your work? |
| 4. Ideas | Have you tried [fill in the blank]? |

After:

- What went well?
- Anything you would change for next time (or the future)?
- Discuss other similar or new projects/tasks to work on next.



TEAM PERFORMANCE REVIEW

PURPOSE

Use this template to build trust by creating an open feedback culture among teams.

Reflect on the past:

- Any individual and/or team highlights worth sharing?
- Any individual and/or team lows worth sharing?
- Review team goals and objectives.
(monthly, quarterly, annually)
- Review company goals and objectives.
(monthly, quarterly, annually)
- Review company mission, vision, and purpose.
- Celebrate wins and successes.

Make a plan:

- What individual goals could you set that would help assist overall team or company goals?

Look to the future:

- How can you contribute to other projects or tasks for which our team is responsible?

Good:

Employees voice opinions privately or with HR and managers react accordingly.

Best:

Teams discuss openly, sharing roadblocks and hardships they experience, and the group creates a joint solution.



UPWARD FEEDBACK

PURPOSE

Use this template to help managers and leaders recognize how they impact their team.

Level set on support needed:

- What can [manager] do to help you be more engaged?
- How is [manager] setting you up for success?
- [Manager] brings focus to important, tasks, ideas, or messages:
- How does [manager] ensure employees are in the right role?

Ask for feedback:

- What are some things I do well as your manager?
- What is one area that I can improve as your manager?

Good:

Managers ask for feedback and employees share anonymously or through surveys.

Best:

Managers and employees discuss opportunities for growth and collaborate to work better as a team.

STAFF TRAINING AND DEVELOPMENT POLICY

Our Employee Development policy refers to the organization's learning, training and development programs and activities.

In the modern competitive environment, employees need to replenish their knowledge and acquire new skills to do their jobs better. This will benefit both them and the organization. We want them to feel confident about improving efficiency and productivity, as well as finding new ways towards personal development and success.

Scope

This policy applies to all permanent, full-time or part-time, employees of the organization. Employees with temporary/short-term contracts might attend trainings at their manager's discretion.

This policy doesn't cover supplementary employees like contractors or consultants.

Policy elements

Employees, managers and Human Resources (HR) should all collaborate to build a continuous professional development (CPD) culture. It's an employee's responsibility to seek new learning opportunities. It's a manager's responsibility to coach their teams and identify employee development needs. And it's HR's responsibility to facilitate any staff development activities and processes.

What do we mean by training and development?

In general, we approve and encourage the following employee trainings:

- Formal training sessions (individual or corporate)
- Employee Coaching and Mentoring
- Participating in conferences
- On-the-job training
- Job shadowing
- Job rotation

As part of our learning and development provisions, we can also arrange for subscriptions or educational material, so employees will have access to news, articles and other material that can help them become better at their job. There are two conditions for this:

- Subscription/Material should be job-related
- All relevant fees should not exceed a set limit per person

This list doesn't include software licences or other tools that are absolutely necessary for employees' jobs.

Individual training programs

The organization has certain provisions regarding individual training programs. All employees that have worked for the organization more than four months are eligible to participate in external training programs individually or in teams. We will set a budget for each employee at the beginning of a year, which we'll renew annually. Employees can be absent for training for up to 10 days per year.

Employees can choose to attend as many training programs as they want, provided they don't exceed the budget and day limit. If they do, they'll have to use their paid time off (PTO) and pay any extra fees themselves.

Employees may have to bring proof of attendance.

Any employee training that the organization mandates (e.g. due to inadequacies of an employee's performance or changes in their job description) is excluded from the training budget and time limit. The organization may take care of the entire cost.

All trainings should consider what employees need and how they can learn best. This is why, we encourage employees and managers to consider multiple training methods like workshops, e-learning, lectures and more.

Corporate training programs

We might occasionally engage experts to train our employees. The organization will cover the entire cost in this case. Examples of this kind of training and development are:

- Equal employment opportunity training
- Diversity training
- Leadership training for managers
- Conflict resolution training for employees

This category also includes training conducted by internal experts and managers. Examples are:

- Training new employees
- Training teams in organization-related issues (e.g. new systems or policy changes)
- Training employees to prepare them for promotions, transfers or new responsibilities
- Employees won't have to pay or use their leave for these types of trainings. Attendance records may be part of the process.

Other types of training

Both employees and their managers are responsible for continuous learning. Employees should show willingness to improve by asking their managers for direction and advice. Managers should do the same with their own superiors, while encouraging and mentoring their subordinates.

Employees and managers are responsible for finding the best ways to CPD. They can experiment with job rotation, job shadowing and other types of on-the-job training (without disrupting daily operations). We also encourage employees to use their rights for self-paced learning by asking for educational material and access to other resources within allocated budget.

General guidelines:

- All eligible employees are covered by this policy without discriminating against rank or protected characteristics.
- Managers should evaluate the success of training efforts. They should keep records for reference and better improvement opportunities.
- All employee development efforts should respect cost and time limitations, as well as individual and business needs.

- Employees should try to make the most out of their trainings by studying and finding ways to apply knowledge to their work.
- Employees are encouraged to use up their allocated training budget and time.

Procedure

This procedure should be followed when employees want to attend external training sessions or conferences:

- Employees (or their team leaders) identify the need for training.
- Employees and team leaders discuss potential training programs or methods and come up with suggestions.
- Employees or team leaders contact HR and briefly present their proposal. They might also have to complete a form.
- HR researches the proposal, with attention to budget and training content.
- HR approves or rejects the proposal. If they reject it, they should provide employees with reasons in writing.
- If HR approves, they will make arrangements for dates, accommodation, reserving places etc.
- In cases where the organization doesn't pay for the training directly, employees will have to pay and send invoices or receipts to HR. HR will approve employee reimbursement according to this information.
- If an employee decides to drop or cancel a training, they'll have to inform HR immediately. They'll also have to shoulder any cancellation or other fees.
- In cases where training ends with examination, employees are obliged to submit the results. If they don't pass the exam, they can retake it on their own expense.

Generally, the organization will cover any training fees including registration and examination (one time). They may also cover transportation, accommodation and personal expenses. This is left to HR's discretion. If HR decides to cover these costs, they should make arrangements themselves (e.g. tickets, hotel reservations). Any other covered expense that employees have will be reimbursed, after employees bring all relevant receipts and invoices.

If employees want subscriptions, they should contact HR directly or ask their managers to do so. HR will preferably set up the subscription. In some rare cases, they might give formal approval to employees so they can do it themselves. Once employees make arrangements, they should inform HR of the cost and any other details in writing. Any relevant invoices should also be sent to HR.

HR's responsibilities also include:

- Assessing training needs
- Maintaining budgets and training schedules
- Assisting with learning and development activities and strategies
- Promoting corporate training programs and employee development plans

Calculating learning and development KPIs whenever possible and decide on improvements