

Performance Excellence Program

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Program Objectives

The objectives of the Performance Excellence Program are:

1. To consider how your personal behaviors support the values of the organization
2. To reflect upon your past year SMART Goal and Key Performance Indicators (KPIs), recognize your successes and understand your challenges
3. To set KPIs and/or SMART Goals for the coming year, and break them down into achievable milestones (90/120 days)
4. To identify opportunities for professional growth and development
5. To provide feedback to your manager on the support/assistance you need from him/her

Program Elements

The Performance Excellence Program consists of the following elements:

1. Core Values
2. Annual KPIs and SMART Goals

Directions

1. Please complete the Values and Annual Review and send a copy to your manager by _____. Please consider all the ways that you can support the Company achieving our KPIs and Goals for the year to come.
2. Your manager will then fill out their portion of the review (within 1 week).
3. You and your manager will meet to discuss the responses (within 1 week).

Definitions

A KPI (Key Performance Indicator) is a quantifiable (numeric) performance measurement used to define and measure success.

A SMART Goal is a project or initiative that supports the achievement of a KPI or goal.

SMART means that it is:

1. **Specific** – Be precise, there should be no doubts as to what is expected.
2. **Measurable** – How can I measure this goal? How will I know when it's completed?
3. **Achievable** – Competent employees should be able to reach the set standard.
4. **Results-Oriented** – Measure the outcome/result, not the process.
5. **Time-Bound** – Expected results have a set time frame to be accomplished in.

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Section 1: Core Values - Annual Review

Why Values Matter

Corporate Culture is a key contributor to our success. Our culture is determined by the values and beliefs that guide our internal and external behaviors. We have identified the following values as being critical to building a successful organization and a rewarding place to work. Employees who exemplify these values will help to build the effectiveness of our organization and our team.

Values Rating Levels and Definitions

For each value, the employee is asked to write how effectively they think they are demonstrating the Company's core values, and provide specific examples that support their opinion. The manager will then add their own comments to each value. The manager should probe for obstacles that are impeding an employee from completing his/her goals, and determine how they can assist the employee.

ROCKSTAR	FULLY MEETING EXPECTATIONS	DEVELOPING/NOT MEETING EXPECTATIONS
Definition: Frequently demonstrates exemplary behaviors which directly help the Company achieve our goals. Drives and supports development, both theirs and others.	Definition: Acceptable behaviors at a level expected for the role; getting the job done in a consistent manner.	Definition: This individual could be new to their role or exhibit behavior that is below expectations and which gets in the way of Company success.
Looks Like: A team member who lives Company's values. A role model in the organization. Drives growth. Builds the culture. Supports or initiates progress.	Looks like: A team member who does what is expected within the responsibilities/rocks of their role.	Looks Like: An individual who displays behaviors that are not supporting the achievement of Company's goals or culture.

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Core Values Evaluation

CORE VALUE	COMMENT / EXAMPLES	RATING
Value 1. Competency 2. Competency 3. Competency	Employee: Manager:	Employee: Manager:
 1. _____ 2. 3.	Employee: Manager:	Employee: Manager:
 1. _____ 2. 3.	Employee: Manager:	Employee: Manager:
 1. _____ 2. 3.	Employee: Manager:	Employee: Manager:

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<div>_____</div> <div>1.</div> <div>2.</div> <div>3.</div>	<div>Employee:</div> <div>Manager:</div>	<div>Employee:</div> <div>Manager:</div>
<div>_____</div> <div>1.</div> <div>2.</div> <div>3.</div>	<div>Employee:</div> <div>Manager:</div>	<div>Employee:</div> <div>Manager:</div>
<div>_____</div> <div>1.</div> <div>2.</div> <div>3.</div>	<div>Employee:</div> <div>Manager:</div>	<div>Employee:</div> <div>Manager:</div>
OVERALL	<div>Employee:</div> <div>Manager:</div>	<div>Employee:</div> <div>Manager:</div>

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Section 2: Annual KPIs and SMART Goals

(Setting → To be finalized and approved during the Performance Review Meeting.)

(Review of Results → To be completed at the end of annual review period, before next Performance Review Meeting.)

Departmental and/or Personal Key Performance Indicators (KPIs)

KPI Setting		Review of Results	
Annual KPI	Development or Support Needed	Result	Comment
KPI 1:			<i>Employee:</i> <i>Manager:</i>
KPI 2:			<i>Employee:</i> <i>Manager:</i>
KPI 3:			<i>Employee:</i> <i>Manager:</i>

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SMART Goals – Projects/Initiatives to support KPIs

Annual Goal Setting		Review of Annual Results	
Annual SMART Goal	Development or Support Needed	Result	Comments
Goal 1:			Employee: Manager:
Goal 2:			Employee: Manager:
Goal 3:			Employee: Manager:
Competency/Value Based Goal 4:			Employee: Manager:

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Acknowledgement

Please acknowledge by signing below that you have participated in this review discussion.

Employee's Name _____

Employee's Signature _____ Date: _____

Manager's Name _____

Manager's Signature _____ Date: _____