

Performance Review Guidelines and Best Practices

Performance reviews are structured evaluations of an employee's/staff's work over a specific period, designed to assess how well they meet the expectations of their role. They provide opportunities for employees and managers to reflect on achievements, identify areas for improvement, and set clear goals for future development. When designed thoughtfully and implemented in regular cadence, performance reviews are a vital tool for fostering growth, accountability, and alignment within the workplace.

This document discusses general performance reviews that are conducted for all employees.

Objectives

- ✓ To measure and evaluate an employee's job-related aptitude, attributes, behaviors, and results.
- ✓ To provide honest feedback and assessment of the employee's performance that affords the employee the opportunity for improvement and the practice the opportunity to recognize employee contributions.
- ✓ To ensure the employee and the practice are clearly aware of the objectives, expectations, performance measures and results.
- ✓ To establish employee goals that support professional growth as well as practice goals.
- ✓ To ensure that goals are realistic and attainable.
- ✓ To determine if any resources, training or development is required.

Best Practices for providing feedback

- It is crucial that all performance reviews are structured and **documented**. The documentation of performance reviews is of particular importance if escalation in performance management is deemed necessary.
- Performance appraisals should be a balanced, honest, and fair review of the employee's performance that focuses on the work, not the person.
- The employee's strengths should always be acknowledged and good performance reinforced.
- Areas of improvement should be discussed while specifically citing examples where possible.
- Regular check-ins during the conversation with the employee while discussing areas of improvement may be needed to avoid miscommunication.
- It is advisable to collaborate with the employee to develop an action plan for areas of improvement.
- Consider breaking down improvement targets into smaller steps over time, when possible.
- Ensure the employee is able to provide feedback to the employer as well.
- Some clinics develop performance review templates that can be shared with the employee ahead of the meeting to provide them with an opportunity to better prepare for the meeting.
- If an employee has a conflict or concern with the review, this should be documented and attached to the performance review.
- Although many clinics connect performance reviews with raises, it may be better practice to separate the two conversations completely to prevent employees from becoming defensive or

see the process as a justification for compensation. some clinics provide cost of living increases regularly and focus on performance reviews as an opportunity to discuss performance without any confounding factors.

General Guidelines for Performance Reviews

Setting & Timeline	Feedback & Discussion	Documentation & Follow-up
<p>The performance appraisal should be conducted in a safe and private setting.</p>	<p>Employees should be encouraged to communicate any challenges they may be encountering in their work during the review process.</p>	<p>All performance appraisals should be documented using the applicable form and kept in the employee's file.</p>
<p>The employee should be given advance notice of all performance appraisals.</p>	<p>During performance appraisals, the employee should have an opportunity to review the appraisal and ensure they understand the evaluation criteria.</p>	<p>All performance appraisals should be documented using the applicable form and kept in the employee's file.</p>
<p>The performance of each employee should be reviewed formally and in writing, at least, on an annual basis.</p>	<p>When completing the performance evaluation, include examples, context or additional comments relating to the corresponding competency, especially if a competency is below or above expectations.</p>	<p>Document any employee's performance-related concerns and to regularly follow-up with employees requiring performance improvement.</p>
<p>Annual performance reviews should be conducted at or around the same date each year.</p>	<p>Establish performance objectives and goals collaboratively for the upcoming year during the annual performance review. The goals and objectives are intended to set expectations and provide a framework for ongoing evaluation throughout the year.</p>	<p>Performance appraisals are not intended to be linked to compensation. Decisions around compensation are separate and should be documented elsewhere.</p>