



Severn Group

# Employee's Guide to Performance Reviews

JUNE 2023

# Introduction

Performance appraisals, form part of a holistic approach to managing performance. Performance appraisals are critical in the broader processes that make up performance management. Through a two-way conversation, they aim to identify growth and improvement areas and inform suitable development plans; or inform administrative decisions on contractual aspects of employment (such as pay, bonuses, promotions or performance improvement plans, etc).

A performance review aims to use the feedback received for professional improvement and identify any areas of concern. However, performance reviews are not limited to these areas; they can also include discussions around:

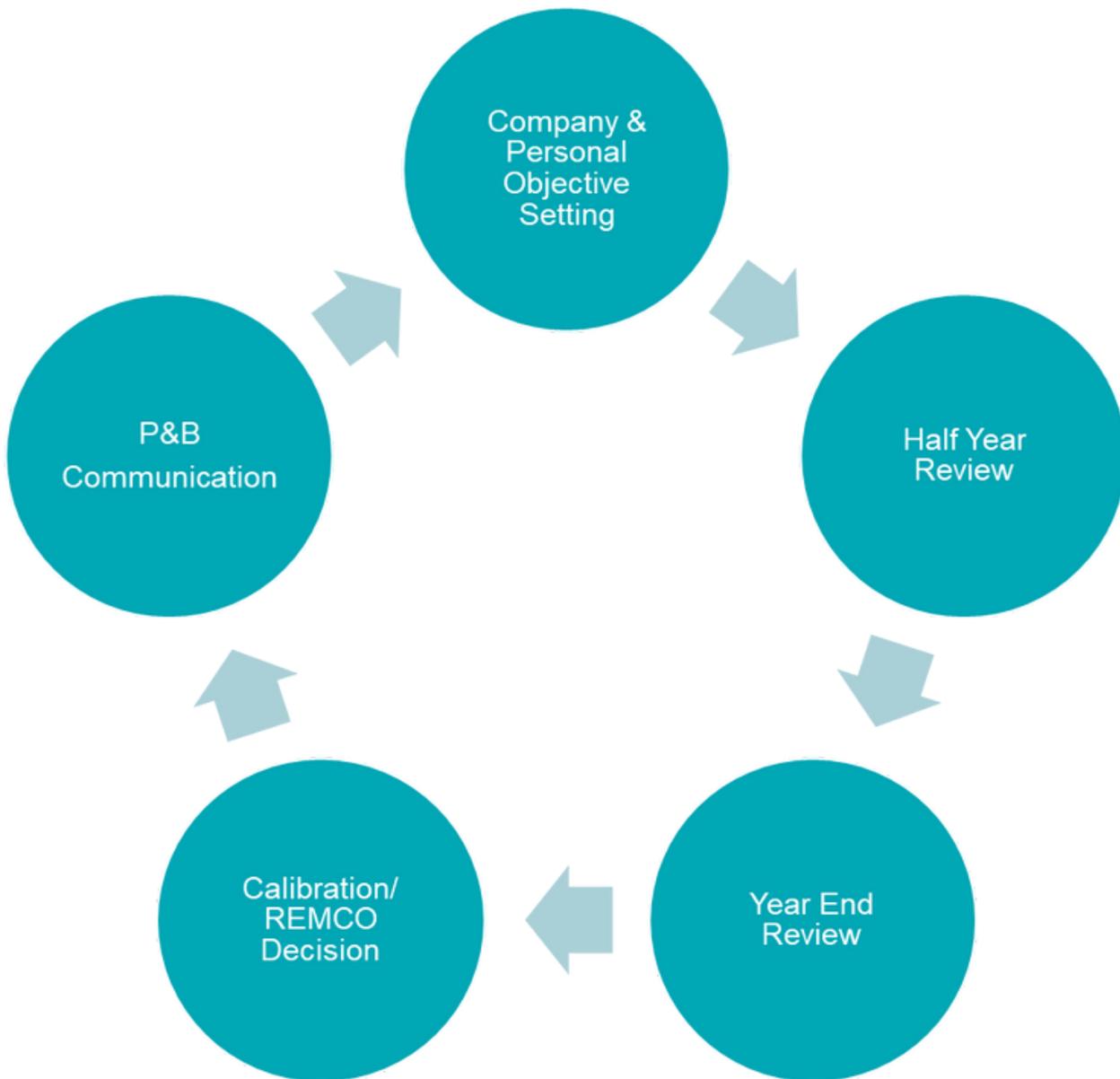
- A general well-being check-in
- How you are currently progressing towards goals and Objectives
- How effective is their working style
- Soft skills such as time management and communication
- Attendance, punctuality and behaviour in the workplace

Performance reviews are important to our Company, they ensure you are more engaged and productive. Our people want to know how they're performing. They want to know if they're meeting expectations and they want to know what they can do to improve their performance. Without regular performance reviews, it's likely that you have very little idea where you actually stand and if you are fulfilling your role.

Regular and recurring feedback is key to a successful and engaged Company.

To ensure we have a robust and transparent process for carrying out performance appraisals we will now use a digital format through the HR System. The System is designed to be simple and easy to use, while also providing data and key insights into the performance of our people.

# The Performance Management Cycle



# The Process

The People Team will initiate the invitation to complete the performance appraisal form through the HR System



You will receive a notification to complete the form in the Task section of the HR System



Complete the form, then submit to your line manager



The line manager will then review the appraisal and arrange a face to face meeting with you to review



When both parties have discussed the review and agreed on the results you will receive the form back, which is read-only and then you can submit it through the System.

# The Rating Scale

As part of the performance management process, we will utilise a rating scale to which you will be assessed throughout the appraisal and the results will provide an average score which enables the Company to see at what level you are performing and also identify areas for improvement. When completing a performance review, it is crucial that you understand the rating scale and the expectation for each rating:

## 5 = Outstanding

- Performance represents an extraordinary level of achievement and commitment in terms of quality and time, technical skills and knowledge, ingenuity, creativity and initiative
- Models the values of the Company on a daily basis
- Steps outside of existing responsibilities to add value to the Company
- Acts as a mentor and guide to others
- Actively promotes cooperation, understanding and teambuilding

## 4 = Exceeds Expectations

- All goals, objectives and targets were achieved above the established standards
- Actively demonstrates our values
- Assumes extra responsibilities and participates in projects often
- Proactive in planning, problem-solving and initiating solutions within the workgroup
- An exceptional contributor to the success of the workgroup and Company

## 3 = Successful

- Performance met expectations in terms of quality of work, efficiency and timeliness. The most critical annual goals were met.
- Acts in accordance with our values
- Performance consistently meets the demands placed upon the position
- Assumes additional responsibilities when requested or assists in extra project work
- Contributes positively to the success of the workgroup and Company

## 2 = Improvement Expected

- Performance failed to meet expectations and/or one or more of the most critical goals were not met
- Does not always act in accordance with our values
- Performance requires occasional supervisory intervention
- Does not consistently complete job assignments in some areas in an accurate and timely fashion
- Performance or behaviour causes occasional problems for customers, department or co-workers

## 1 = Under-Performing

- Performance was consistently below expectations, and/or reasonable progress toward critical goals was not made. Significant improvement is needed in one of more important areas
- Does not act in accordance with our values
- Often requires supervision, redirection and/or re-instruction
- Does not consistently complete job assignments in an accurate and timely fashion
- Performance or behaviour often causes problems for customers, department or co-workers

# Preparing for your performance appraisal

Preparing for an appraisal is an important step for employees to showcase their achievements, discuss their challenges, and set goals for future growth and development. Here are some key things to consider when preparing for an appraisal:

1. **Review your job description:** Familiarise yourself with the expectations and responsibilities outlined in your job description. Assess how well you have met these expectations and make note of any additional tasks or responsibilities you have taken on.
2. **Reflect on your accomplishments:** Take time to reflect on your achievements. Consider projects you have successfully completed, goals you have achieved, and any positive impacts you have made on the Company. Quantify your accomplishments with specific metrics, such as increased sales revenue or improved customer satisfaction.
3. **Identify areas for improvement:** Reflect on your own performance and identify any areas where you believe you could improve. Be honest with yourself and acknowledge any challenges or shortcomings you have faced. This demonstrates self-awareness and a willingness to grow professionally.
4. **Prepare to discuss development opportunities:** Think about any training programs, certifications, or skill-building activities that would enhance your performance in your current role or prepare you for future opportunities. Be ready to discuss these development opportunities with your line manager during the appraisal.
5. **Consider your long-term career aspirations:** Reflect on your long-term career goals and how your current role fits into that trajectory. Communicate your aspirations to your supervisor, highlighting how you envision your growth within the Company and any additional responsibilities or challenges you are eager to take on.
6. **Anticipate challenges and suggestions:** Be prepared to discuss any obstacles or challenges you have encountered in your role. Consider potential solutions or suggestions for improvement. This demonstrates problem-solving skills and proactive thinking.
7. **Practice effective communication:** Pay attention to your communication skills and ensure you can effectively articulate your thoughts and achievements. Practice delivering your self-assessment and responses to potential questions. Be open and receptive to feedback during the appraisal discussion.

Remember, the appraisal is an opportunity to showcase your strengths, discuss your contributions, and plan for future growth. By preparing thoughtfully, you can make the most of this evaluation process and actively contribute to your professional development.

# Mid-Year Appraisals

## Stage 1 - Employee

Here, you can complete the below sections:

### Employee Wellbeing

Answer general questions on how you feel you are getting on both in and out of work.

### Objectives Review

An opportunity for you to reflect on your Objectives from the previous period.

### Core Values, Behaviours & Objective Performance

Rate yourself against our values and behaviours adding comments and examples where possible. This will generate your overall score which shows the level you are working.

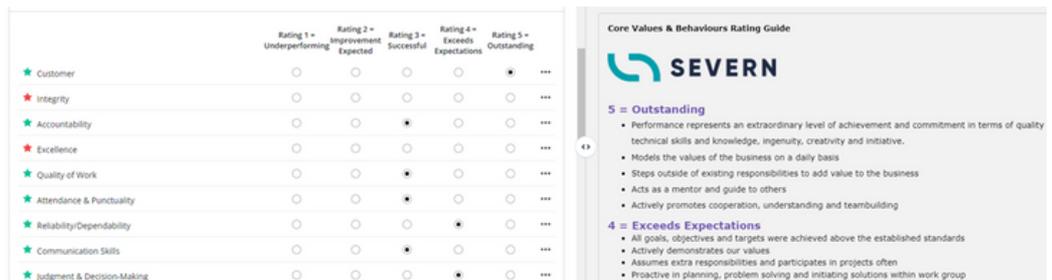
### Job Specific Performance

Reflect upon how you have performed in your role, linking back to the core values and behaviours.

### Training & Development

Highlight any training and development in the previous year as well as any career aspirations.

You can use the  button to open another part of the form in a split-screen view. This will be particularly useful when completing the Core Values & Behaviours section, where you can open the Rating Scale in a split-screen view.



	Rating 1 = Underperforming	Rating 2 = Improvement Expected	Rating 3 = Successful	Rating 4 = Exceeds Expectations	Rating 5 = Outstanding
★ Customer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
★ Integrity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Accountability	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Excellence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Quality of Work	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Attendance & Punctuality	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Reliability/Dependability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
★ Communication Skills	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Judgment & Decision-Making	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Core Values & Behaviours Rating Guide**

**5 = Outstanding**

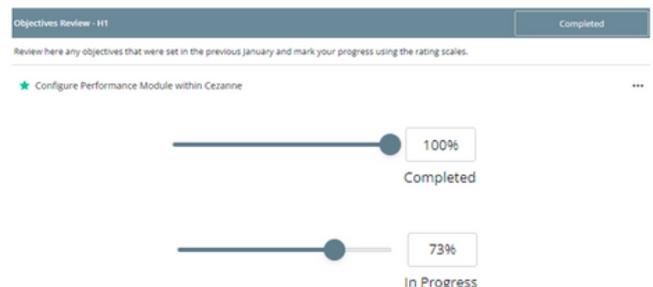
- Performance represents an extraordinary level of achievement and commitment in terms of quality technical skills and knowledge, ingenuity, creativity and initiative.
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**4 = Exceeds Expectations**

- All goals, objectives and targets were achieved above the established standards
- Actively demonstrates our values
- Assumes extra responsibilities and participates in projects often
- Proactive in planning, problem solving and initiating solutions within work group

In the final section of the form, you will also see a summary of all the Objectives that were set in the Year End review. Here, you can:

- Use the sliding scale to highlight percentage completion
- Enter in the Result field the outcomes and any comments



Objectives Review - 1/1 Completed

Review here any objectives that were set in the previous January and mark your progress using the rating scales.

★ Configure Performance Module within Cezanne

100% Completed

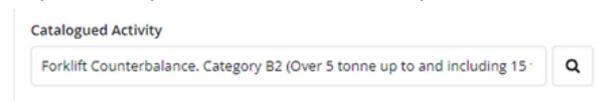
73% In Progress

# Mid-Year Appraisals

Use the Summary Comments section at the very bottom of the form to add any additional notes or comments for discussion.

Finally, use the Development Plan tab on the menu to review any development items.

You can add a New Need into the first field if your need is more general. Use the Catalogued Activity search button to search for catalogued courses in the System if your requirement is to complete a specific training course.



Catalogued Activity

Forklift Counterbalance. Category B2 (Over 5 tonne up to and including 15'

You can again set the Sort Order to highlight priorities as well as stating the To be Completed in period as well as a Reason and any Comments.

## Stage 2 - Manager

Next, the form will route to your line manager who will arrange a meeting with you. As part of the meeting, the answers and Objectives under the appraisal form will be reviewed and discussed. The Development Plan should also be reviewed at the same time.

This will also be the opportunity for your line manager to set Objectives for the period ahead under the New Objectives tab.

## Stage 3 - Employee

Finally, the form will route back to you, where you will have view-only access to the form and can sign-off accordingly.



Appraisal

Rating Scale

Development Plan

# Year-End Appraisals

## Stage 1 Employee

Here, you can complete the below sections:

### Employee Wellbeing

Answer general questions on how you feel you are getting on both in and out of work.

### Objectives Review H1 & H2

A final opportunity for you to reflect on your Objectives from the previous year.

### Core Values, Behaviours & Objective Performance

Rate yourself against our values and behaviours adding comments and examples where possible. This will generate your overall score which shows the level you are working.

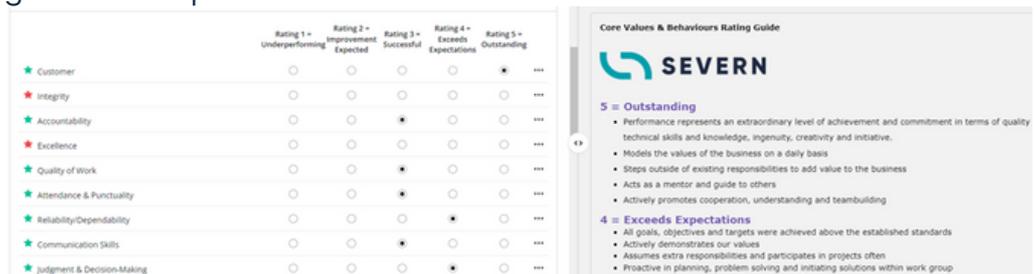
### Job Specific Performance

Reflect upon how you have performed in your role, linking back to the core values and behaviours.

### Training & Development

Highlight any training and development in the previous year as well as any career aspirations.

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**Core Values & Behaviours Rating Guide**

**SEVERN**

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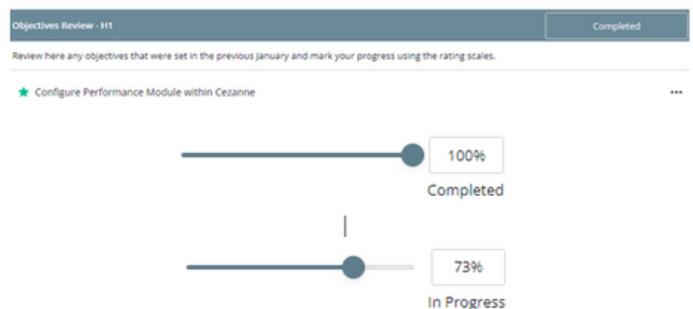
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In the final section of the form, you will also see a summary of all your Objectives from the previous year, split into H1 and H2 where you can:

- Use the sliding scale to highlight percentage completion
- Enter in the Result field the outcomes and any comments



Objectives Review - H1 Completed

Review here any objectives that were set in the previous January and mark your progress using the rating scales.

★ Configure Performance Module within Cezanne

100% Completed

73% In Progress

# Year-End Appraisals

Use the Summary Comments section at the very bottom of the form to add any additional notes or comments for discussion.

Finally, use the Development Plan tab on the menu to review any development items.

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Appraisal

Rating Scale

Development Plan



Catalogued Activity

Forklift Counterbalance. Category B2 (Over 5 tonne up to and including 15



## Accountability

As individuals, as teams and as an organisation, we take responsibility for our work

We prize the sense of belonging and family spirit across our operations. Everyone at Severn Group contributes to our success – we are incentivised and empowered to positively impact business achievements, environmental sustainability and high performance in safety.



# Year-End Appraisals

## Stage 2 Line Manager

Next, the form will route to your line manager who will arrange a meeting with you.

As part of the meeting, the answers and Objectives under the Appraisal form will be reviewed and discussed. The Development Plan should also be reviewed at the same time.

This will also be the opportunity for your line manager to set Objectives for the year ahead under the Objectives Planning tab.

## Stage 3 - Employee

Finally, the form will route back to you, where you will have view only access to the form and can sign off accordingly.





At Severn Group, our business success flows from expertise – from technical knowledge and experience that position us as a leader in our field. Not everything, however, can be engineered. The Values which underpin that success stem instinctively from the culture we seek to sustain. Everything we do is tested against our Values, and our people are encouraged to apply them every day: they are the stewards of our brand, our reputation, our heritage, our ambitions.



**Customer**



**Integrity**



**Excellence**



**Accountability**



**SEVERN**  
Superior Valve Engineering