How to Create and Manage Performance Evaluation

Change Log

| Version	Date	Details
1	Oct 29, 2024	Initial version

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What is a Performance Evaluation

A performance evaluation is an assessment of an employee's performance at My Gym based on their role. For example, Lead Teachers will be evaluated with a different set of criteria than Shift Leads and Managers. The purpose of the evaluation is to facilitate a conversation with the employee to talk through what is going well and what needs to be improved upon.

Performance evaluations are not always completed by an owner or manager for an employee. There may be a time when employees are asked to evaluate each other. As such, everyone has the ability to create a new evaluation, though they should only do so when requested.

Creating the Evaluation

To create a new evaluation, start by selectinig the "New evaluation" button. This is located at Home → Evaluations.
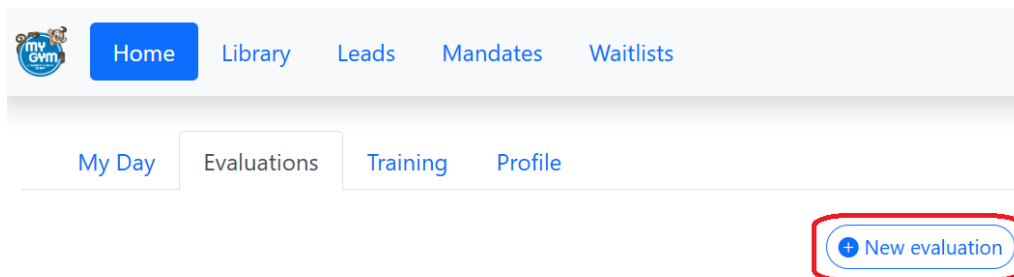
The popup you given will ask you to specify the type of evaluation you want to create.
- Select "Performance" next to "Evaluation Type"
- Select the appropriate evaluation for the individuals role next to "Select Evaluation". As of the writing of this document, the options are "Lead Teacher", "Shift Lead", and "Manager".
- Click "Add"

You will be redirected to the newly created evaluation of the type you selected. The first thing to do is set the Employee that you are reviewing from the dropdown.

Lead Teacher Performance Evaluation

Evaluation Date	Will set upon completion
Reviewer	Sam ⌄
Employee	Elise ⌄

Scroll down on page and you will see a list of assessments. Score the employee on a scale of 1-4 for each assessment by selecting the appropriate radio button.

The scores reflect how consistent the employee is at honoring the assessment item:

- 1 is "Rarely / Never" - this is an area that the employee shows no accountability for and needs to work on
- 2 is "On Occasion"
- 3 is "Most of the Time"
- 4 is Always / Without Fail - this means the employee never forgets and consistently completes the item

Assessment

Score each item below on a scale from 1-4.
1 = Rarely / Never | 2 = On Occassion | 3 = Most of the Time | 4 = Always / Without Fail

Class & Birthday Party Quality

Comes prepared having studied curriculum	○ 1 ○ 2 ○ 3 ○ 4
Starts classes on time and follows curriculum completely without skipping elements	○ 1 ○ 2 ○ 3 ○ 4
Deals promptly and effectively with class discipline issues	○ 1 ○ 2 ○ 3 ○ 4
Leads high quality, high energy classes, and maintains 'My Gym' smile	○ 1 ○ 2 ○ 3 ○ 4

The values you select on each assessment are used to calculate an overall score for the Performance Review. The score will update live with each selection you make.

Score   Acceptable (88.0%)

After all of the assessments are complete, scroll back up and complete the text fields. The fields that need to be completed are:
- Describe at least one thing the employee is doing well and should continue
- Describe at least one thing the employee needs to focus on improving
- Overall Feedback

Try to be as crisp and constructive in your feedback as possible. The key takeaways should be clear for the employee and there should be something actionable that they should plan to work on before the next review.

Describe at least one thing the employee is doing well and should continue	
Describe at least one thing the employee needs to focus on improving	
Overall Feedback	

The evaluation will not let you proceed until all fields are completed. You must have a reviewer set, an employee set, a score for each assessment, and notes provided in each of the 3 feedback section. If any value is missing, the status will display as "Please complete all fields".

Status   Please complete all fields

Once all fields have been completed, the status field will change to display the 3 key milestones. The first milestone is accomplished by you when you submit the evaluation for approval. The second milestone is completed once Sheryl reviews and approves the evaluation. The final milestone is completed by the evaluated employee after they have reviewed the evaluation.

Status   ⊘ Pending Completion
                    ⊘ Pending Approval
                    ⊘ Pending Review by Elise

Once all the fields are completed, you will now also see a new big yellow button at the top of the evaluation stating "Click here to submit for owner approval when complete". When you are satisfied with your assessment scores and the feedback you have entered, select this option. This will send the review to Sheryl for her approval.

Please note: Once you have submitted for approval, you will no longer be able to make edits to the evaluation.

Lead Teacher Performance Evaluation

Click here to submit for owner approval when complete   Disable Edit

Evaluation Date	Will set upon completion
Reviewer	Sam ⌄
Employee	Elise ⌄

You will now also notice that the status has updated to indicate that you have completed the evaluation.
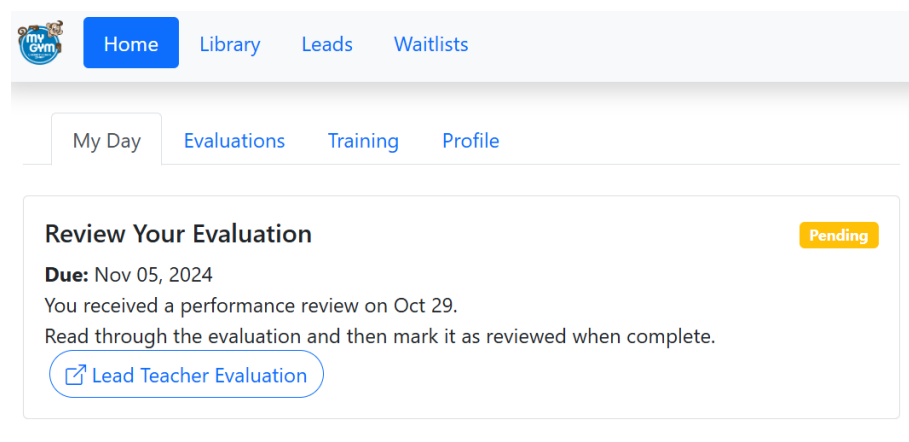
Status
- ✅ Completed by Sam on Oct 29, 2024
- ✅ Pending Approval
- ✅ Pending Review by Elise

Reviewing and Accepting My Evaluations

When someone has created an evaluation of your performance and it has been approved by Sheryl, you will see an action item show up on your "Home" page to review the evaluation. Click on the link in the action item to view the evaluation.

Once you have reviewed the evaluation, including your assessment scores and the feedback provided, you will need to click the big yellow button at the top labeled "Click here once you've read this evaluation". Doing so will remove the action item from your "Home" page.

Viewing Evaluations Created for Me

All of the evaluations that have been created for you of any type (currently class or performance) will show up at Home->Evaluations. You can quickly see your score and click to View the details of the evaluation.

| My Day | Evaluations | Training | Profile |

⊕ New evaluation

Date	Evaluation Type		Score	
Sep 11, 2024	Class	Terrific Tots	Excellent (97.5%)	View
Sep 09, 2024	Class	Waddlers	Good (90.7%)	View
Jun 26, 2024	Class	Waddlers	Good (91.2%)	View
Jun 16, 2024	Class	Terrific Tots	Good (92.8%)	View
May 21, 2024	Class	Ninja Jr	Good (93.3%)	View

Viewing Evaluations You've Created

All of the evaluations that you have created for others will show up under the "Evaluations I've Completed" section at Home->Evaluations. You can quickly see the score, who was reviewed, who has reviewed the evaluation, and click to View the details. Additionally, if the evaluation is still in a draft state, meaning you have not yet marked it as complete, you can choose to delete the evaluation.