

**Guideline Document Library**

**Compose Project Performance Checkpoint Form**

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RECORD OF CHANGE

\* A – Added, M – Modified, D - Deleted

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| --- | --- | --- | --- | --- |
| **Date** | **Changed Items** | **\*A, M, D** | **Description** | **Version** |
| 25 Jul, 2011 | Update Review policy | M |  | 1.0 |
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|  | Name & Role | Date | Signature |
| **Originator** | Huyen Nguyen - RM | 18 April, 2011 |  |
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# INTRODUCTION

The guideline describes company’s procedure to implement the review which is conducted every 6 months or at the end of project for individuals.

## Purpose

To provide guideline to associate who will do project performance review, in general it is to introduce:

* Trigger to start project performance review
* Steps need to perform the review
* Rating system

## Scope

The guideline will apply for people who are eligible for the checkpoint review

## Definitions, Acronyms and Abbreviations

| **Term** | **Explanation** |
| --- | --- |
|  |  |

## References

| **No** | **Document Name** | **Ref to:** |
| --- | --- | --- |
| 1 | HNVN-HR-FM Project Performance CheckPoint Form.xls | <https://intranet.harveynash.vn/_layouts/xlviewer.aspx?id=/Process%20Asset%20Library/HR%20Process,%20Guidelines,%20Checklists/HNVN-HR-FM%20Project%20Performance%20CheckPoint%20Form.xlsx> |
| 2 | HVN-HR-GD Compose Project Performance Checkpoint Form.docx | <https://intranet.harveynash.vn/Process%20Asset%20Library/HR%20Process,%20Guidelines,%20Checklists/HVN-HR-GD%20Compose%20Project%20Performance%20Checkpoint%20Form.docx> |
| 3 | HNVN-HR-FM Performance Appraisal Form.xls | <https://intranet.harveynash.vn/Process%20Asset%20Library/HR%20Process,%20Guidelines,%20Checklists/HNVN-HR-FM%20Performance%20Appraisal%20Form.xls> |

# REVIEW POLICY

* The review is done semi-annually or when project closes or when an individual released from a project.
* Project Manager/Project Leader will be the reviewer for project tasks and Line manager will be reviewer for non-project tasks (e.g training) and summary on performance of the whole review period.
* One review form is for one project, one individual need N checkpoints for N projects that s/he has worked on in the review period. It’s not required to do checkpoints for these cases:
  + Duration on the project is less than 1 month
  + AND Resource is assigned for learning purpose, non-productive and non-billable

Line Manager will collect feedbacks for those projects and do the review once

* The review is performed within 2 weeks after the end of the reviewed period or after the project closed/resource released.
* The review does not happen at the semi-annual review (e.g when project closes or when resource released from a project) will be optional for Line manager to join.
* Line manager need to be informed about the review meeting and the result.
* Semi-annual review is required for face to face meeting between reviewer and member; Line manager is required to join; DPM is optional.
* Line manager collect all the feedbacks during the review period and make summary, it’s also the time to do career objectives review base on annual review from last year, or define objectives for the second-half year.
* Individuals who have start date in the second quarter of the review period will not need to perform this review.

# REVIEW PLAN

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **No#** | **Step** | **RM** | **Staff** | **PL/TL** | **LM** | **PM** | **DPM** | **Client** |
| 1 | Inform staff the review plan and eligible list | Required |  |  |  |  |  |  |
| 2 | Performance Self-assessment |  | Required |  |  |  |  |  |
| 3 | Fill/Update  Project Performance Checkpoint |  |  | Required |  | Required | Optional | Optional |
| 4 | Face2face Review |  | Required | Required | Required |  |  |  |
| 5 | Update the checkpoint (e.g final rating, feedbacks)  Submit results to line managers and project managers |  | Required | Required |  | Required |  |  |

The detailed review plan will be announced to all staff with specific dates before each review period.

Review period depends on our fiscal year, so for semi-annual review, the two review periods will be:

* Period 1: From 01 February to 31July
* Period 1: From 01 August to 31 January

# COMPOSE PROJECT PERFORMANCE CHECKPOINT

*Important Note*: The review is to assess performance of each individual base on his/her **role** in the project, not base on his/her current position. Therefore, performance is rated basing on responsibilities defined for roles which are specific for each project.

### Performance rating

There are 3 levels of rating for each success factors.

1 - Not meet expectation

2 - Meet expectation

3 - Exceed expectation

Round number is required.

### Overall performance rating

There are 5 levels of rating in general as below:

|  |  |
| --- | --- |
| **Average** | **Level** |
| 1.0 ~ 1.5 | Unacceptable |
| 1.6 ~ 1.9 | Need Improvement |
| 2.0 ~ 2.4 | Meet Expectation |
| 2.5 ~ 2.7 | Exceed Expectation |
| 2.8 ~ 3.0 | Outstanding |

### This result is generated automatically in the form

### Doing assessment

| **Items** | **Guides to Complete** |
| --- | --- |
| **Self-assessment** | * Fill in associate information: FullName, Position, Project Joined Date, Project Role, Review Period and Reviewer * Fill to Self-Rating value for each success factor (Ref. to 4.1.1 Performance rating) * Mandatory to provide specific examples to Comments/Examples |
| **Reviewer to give assessment** | * Fill to Final-Rating value for each success factor * Mandatory to provide specific examples to “Reviewer Feedbacks” * Final ratings in Assessment areas will decide the Final Point Average (e.g cell E68) and overall Performance rating (e.g cell C6) * The Final Point Average will be calculated base on Final Rating with weight = 5 for Job Knowledge , weight = 2 for Work Quality and weight =1 for others * Reviewer to fill in the final comments, suggest areas for improvement |
| **Face to face review** | * Reviewer and staff to have a meeting to agree on the assessment * This is required meeting, Line Manager is required to join * Reviewer to update the form (e.g Review By, Review Date) and deliver to staff, line manager and project manager * Line manager to upload the final file to intranet |