



Standard Operating Procedure (SOP): Mid-Year Performance Evaluation Process

Department: Human Resources

Last Updated: June, 2026

Prepared by: Sr. Director, Human Resources

Purpose

To provide a standardized, fair, and transparent process for conducting performance evaluations that support team member development, performance improvement, and alignment with WhiteWater's organizational goals.

Scope

Applies to all Salaried, Maintenance, and Corporate Team Members eligible for performance evaluation. Covers the full process, including notifications, self-evaluations, manager feedback, 9-Box assessments, review meetings, and check-ins on goals set during the previous performance evaluation. This evaluation does not include a merit increase.

Definitions

- **Team Member Self-Evaluation:** A structured self-assessment completed by the Team Member to reflect on performance, accomplishments, challenges, and areas for growth during the review period.
- **Manager Feedback:** A formal evaluation completed by the Team Member's direct Manager. It provides insights on performance, progress toward goals, and opportunities for development, and includes setting future objectives aligned with both individual and team success.
- **HR Review and Approval:** A process where HR reviews Manager and Team Member inputs, addresses any necessary follow-ups, and finalizes approval of the performance review.
- **In-Person or Virtual Meeting:** A scheduled meeting between the Team Member and their direct Manager to discuss the Self-Evaluation and Manager Feedback. This session focuses on performance insights, two-way feedback, and goal-setting for the next six months. Other leaders may be invited when appropriate.

Evaluation Period and Eligibility: This performance evaluation covers the period from *January 1, 2026, to June 30, 2026*. All Salaried, Maintenance, and Corporate Team Members who have been employed at WhiteWater for at least three months by the end of the evaluation period are eligible to participate.

Roles & Responsibilities

- **Human Resources Department:** Coordinates the process, distributes forms, Approves Manager Feedback, and tracks completion.
- **Managers:** Complete manager feedback, schedule meetings, and deliver evaluations.
- **Team Members:** Complete self-evaluations and participate in review meetings.
- **Leadership:** May review results and provide input on evaluation strategy or calibration.



Procedure

1. Mandatory TalentLMS Training (Managers): 6004 Performance Reviews
 - Launches **June 10, 2026**
 - Training must be completed by **June 19, 2026**
2. Self-Evaluation (Team Members):
 - Eligible Team Members will receive an email notification at their WhiteWater email account on **June 15, 2026**.
 - Self-Evaluations must be completed and submitted no later than **June 22, 2026**.
3. Mandatory 9-Box Assessment & Leadership Review
 - Each Department Head, through the Regional Director level, must complete a 9-Box performance/potential assessment for all eligible team members.
 - Completed 9-Box assessments must be reviewed with HR and a designated member of the C-Suite prior to submitting manager evaluations.
 - All 9-Box reviews must be completed no later than **June 22, 2026**.
4. Manager Feedback:
 - Once a Team Member submits their Self-Evaluation, the Direct Manager will receive an email notification.
 - Managers must complete and submit their feedback by **July 10, 2026**.
5. HR Reviews & Approval:
 - After the Manager submits feedback, HR will review the responses, follow up as needed, and finalize approval by **July 21, 2026**.
6. Scheduling Evaluation Meetings (Managers):
 - Managers should send meeting invitations to Team Members as approvals are received from HR. For on-site team members, meetings can be held in person. For team members who work remotely, meetings should be scheduled virtually through Google Meet to allow adequate time for preparation and planning.
7. Meeting (In-Person or Virtual):
 - Release appraisals at least two days before the meeting.
 - Discussions include self-evaluation, accomplishments, areas for improvement, and goal-setting.
 - All meetings must be completed by **July 31, 2026**.
8. Acknowledgment:
 - Team Members must review and acknowledge appraisals by **July 31, 2026**.

Tools and Systems:

- Platform: Evaluations will be completed in [ADP Workforce Now](#).
- Progress: HR will provide regular updates to ensure timely completion.
- Resources:
 - TalentLMS Training - Best practices for delivering effective reviews.
 - ADP Step-by-Step Guide – A quick reference for navigating the performance dashboard in ADP.
 - [Company Intranet](#) - Central hub where Managers can access all necessary tools, documents, and information.

Documentation & Records



All performance evaluation records, including self-evaluations, manager feedback, acknowledgments, and goal entries, must be stored in ADP Workforce Now. HR will track completion and approvals to ensure accuracy, confidentiality, and compliance.

Compliance & Audit

HR will ensure evaluations comply with company policies and applicable laws, track completion, and maintain records for audits or management review.

Revision History

Date	Description	Owner
January 2024	Initial creation and rollout of	HR

Disclaimer:

This Standard Operating Procedure (SOP) is intended to provide general guidance and does not create a contract, express or implied. The Company reserves the right to modify, suspend, or discontinue this SOP at any time, with or without notice. Where state or local law differs from this policy, the Company will follow the requirements of the applicable jurisdiction.