

MANAGEMENT APPRAISAL TOOL KIT



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THE HENRY



FOX RESTAURANT CONCEPTS

Established 1998

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MANAGEMENT APPRAISAL OVERVIEW

This manual will guide you through the Management Appraisal process and help you better understand the purpose of conducting an appraisal. It will also provide pointers on how to deliver the information most effectively.

What is the Purpose of a Management Appraisal?

- To fairly and consistently evaluate performance.
- To recognize strengths and developmental opportunities.
- To set goals for improvement and development.
- To assist in the selection and elimination of potential candidates for promotions and transfers.

What are the Benefits?

- Provides consistency in performance expectations and measurement.
- Helps identify which behaviors most impact performance and success.
- Identifies gaps and development opportunities.
- Identifies exceptional individuals that contribute to Fox Restaurant Concepts' success.
- Provides feedback to individuals to move them toward exemplary performance.

When do Appraisals Take Place?

The appraisal process takes place during the month of June. The yearly cycle runs from the beginning of July through the end of June.

What is the Appraisal Based On?

For restaurant management, the appraisal is based on the **Quality of Operations** and Fox Restaurant Concepts **Core Competencies**.

What is Quality of Operations?

This section is based on a manager's contribution to the team and the overall store performance. For example (Shopper Reports, Ecosure, Sales and Profitability).

What is a Competency?

Core competencies represent behaviors, knowledge, skills, abilities and other characteristics that contribute to successful job performance. They are also defined as "a written description of measurable work habits and personal skills used to achieve work objectives."

What do Fox Restaurant Concepts Core Competencies Mean?

Competencies are our "recipe" of knowledge, skills, and characteristics needed to effectively perform a management role in our organization.

What is a Competency Based Performance Review?

A competency based performance review is how Fox Restaurant Concepts evaluates a manager based on the work a manager has done since the last review, and how a manager has done the work.

Do we use Competencies Anyplace Else?

Yes! We use them during.....

- Quarterly Manager Reviews
- Selection Process
- Training and Development
- Succession Planning

What restaurant management is rated on:

| Quality of Operations | Core Competencies |
|--|---|
| <ul style="list-style-type: none"> • Service • Bar/Take Out • Kitchen • Front Desk/Cashier • Administration • Sales Building • Facilities | <ul style="list-style-type: none"> • Guest Connection/Hospitality • Job Knowledge & Skills • Problem Solving, Decision Making & Judgement • Coaching • Training & Development • Integrity • Communication Skills • Self-Management • Sensitivity & Credibility • Courage, Tenacity & Drive • Sense of Urgency • Financial Results |

Self Appraisal

Managers are asked to fill out a "self-appraisal" based on their performance over the last cycle.

- Be honest with yourself.
- Don't wait until the last minute to write it.
- Focus on the entire cycle, not just the last few months or weeks.
- Focus on behaviors, give specifics.

PERFORMANCE RATING DEFINITIONS

5 - EXCEPTIONAL

Clearly and consistently demonstrates extraordinary and exceptional competence in an area. Other managers who hold positions of comparable scope/responsibility rarely equal performance of this caliber. This year's contribution clearly moved the business forward in all respects.

4 - VERY GOOD

Clearly and consistently exceed a significant number of job standards. This year's contribution is clearly identifiable and stands out when compared to peer performance.

3 - GOOD

All job standards are met consistently. Performance in this area demonstrates a solid mastery of the skill level for this position. Managers at this level consistently perform in an effective and professional manner both in what was done and how it was accomplished while meeting all objectives.

2 - marginally meets requirements

Performance through implementation or direct results occasionally meets job requirements at this time. The manager may be in the process of developing competencies appropriate for this position or have a genuine deficiency.

1 - requires immediate improvement

Performance through implementation or direct results occasionally meets job requirements at this time. The manager may be in the process of developing competencies appropriate for this position or have a genuine deficiency.

QUALITY OF OPERATIONS

The Quality of Operations section represents high impact operational areas of the restaurant that a select manager has the opportunity to contribute to and influence. Take into consideration the overall performance in these areas, and how the manager's individual contribution had a positive/negative impact.

| | Self | Supervisor | Self | Supervisor | Self | Supervisor | Self | Supervisor | RATING: | |
|--------------------|--------------------|------------|------------------|------------|--------------------|------------|---------------------|------------|---------|------------|
| | | | | | | | | | Self | Supervisor |
| Service | Shoppers | | Staffing Levels | | Talk to Sam | | Training | | | |
| Bar/Take Out | Shoppers | | Recipe Adherence | | Staffing Levels | | Training | | | |
| Kitchen | Line Checks | | Recipe Adherence | | Line-Builds | | Staffing Levels | | | |
| Front Desk/Cashier | Shoppers | | Staffing Levels | | | | | | | |
| Administration | Payroll Exceptions | | New Hire Docs | | Invoice Exceptions | | Office Organization | | | |

As an example:

Administration - Payroll Exceptions, New Hire Docs, Invoice Exceptions, Office Organization

If the restaurant, as a whole, does well in this area (i.e. meets deadlines, has very few exceptions and is organized), then the manager that makes a significant impact in this particular area, should see that reflected in their score on their performance appraisal.

Remember: Offer frequent feedback to assist development, rather than saving comments for periodic performance reviews!

COMPETENCIES AND RATING EXAMPLES

Here is the list of management competencies, with each competency's definition. In addition, we are illustrating examples of what a 5 - Exceptional, 3 - Good and 1 - Requires Immediate Improvement look like.

Guest Connection / Hospitality

- Continually exceeds expectations.
- Develops trust and credibility with the Guest.
- Understands and is responsive to the Guest.
- Finds a way to say YES to the Guest.
- Makes extraordinary situations out of normal events.
- Builds great Guest Relations.

5 – Consistently exceeds Guest expectations, consistently meets new Guests, and goes above and beyond on a daily basis for the Guest. Knows the name of regulars and creates more regulars with interaction.

3 – Sometimes exceeds Guest expectations, when it is convenient will make an extraordinary situation out of a normal event. Recognizes some regulars, is sometimes viewed as available on shopper's reports.

1 – Interacts with Guests as little as possible, does not recognize regular Guest. Rarely will go out of the way for a Guest. Is usually viewed as unavailable or not present on shopper's reports.

Job Knowledge & Skills

- Demonstrates basic skills and knowledge of the job.
- Understands policies, procedures and specifications.
- Maintains and enhances skills and knowledge on a regular basis.
- Plans, prioritizes and organizes work effectively to produce measurable results.
- Identifies and utilizes resources effectively and responsibly.

5 – Has tremendous knowledge of current job, consistently meets deadlines and project requests. Always holds staff and self accountable to policies and procedures.

3 – Most of the time demonstrates an understanding of job requirements. Has area of opportunities in current department. Only maintains current skills and knowledge.

1 – Struggles with the day to day skills and knowledge of the job. Has a hard time holding staff and managers accountable, would prefer to look the other way.

Coaching

- Consistently leads staff by example.
- Effectively coaches and counsels employees in a positive manner.
- Motivates staff to want to come to work every day and give 100%.
- Clarifies responsibilities, authority and expectations.

5 – A role model, coaches others without being asked. Inspires others to do better. Outstanding ability to explain and teach. Always finds time to answer questions for employees. Goes above and beyond daily.

3 – Allocates time for the coaching process. Is available for staff when needed. Leads people to discover their own answers. Coaches at appropriate time and most of the time in appropriate place.

1 – Dictates to others rather than involving them. Slow to delegate authority as employee learns. Staff uncomfortable being coached by the manager. Believes coaching is not part of the job. Overbearing in coaching interactions.

Training and Development

- Conducts performance appraisal and feedback.
- Continually looks for ways to expand job capabilities.
- Establishes operational objective for improving quality and maintains performance accordingly.
- Invests time and resources in professional growth of self and others.

5 – Consistently trains and develops staff daily. Dedicated to developing others. Always performs performance evaluations on time and gives honest feedback and direction.

3 – Gives employees training to enhance knowledge. Develops employees appropriately. Regularly gives feedback and direction to staff. Could improve on investing time in personal growth.

1 – Repeatedly delays giving feedback to employees. Staff is poorly trained and not as productive as they could be. Delegates menial tasks.

Integrity

- Is consistently honest and truthful in all situations.
- Supports culture and values – “Walks the Talk”.
- Determines what is right, not who is right.
- Demonstrates self-confidence and understands his/her own abilities and strengths.

5 – Does what’s right regardless of consequences. Always demonstrates integrity and honesty. Has retained and gained new Guests due to personal ethics.

3 – Deals with Guests fairly. Understands and follows ethical guidelines. Is noted for honesty and fairness. Is respected in his/her position on being fair and honest. Needs to work on not taking sides.

1 – Does not behave ethically. Violates company’s code of ethics. Actions have resulted in losing Guests and/or staff.

Communication Skills

- Presents oneself clearly and articulately when speaking with an individual or before a group assuring that others fully comprehend the intended message.
- Checks for understanding of the communication by asking open ended questions that draw out the listener’s understanding.
- Thinks through material for presentations in advance and organizes presentations in a logical flow.

5 – Superior skills on phone, on the floor and in meetings. Thoughtful and responsive to employees at all levels. Interacts with audience. Admits when he/she doesn’t know rather than “faking it”. Receives positive feedback from interactions with Guests and Employees.

3 – Articulate and well organized speaker. Can explain complicated procedures when called upon. Knows where to find answers if he/she doesn’t know.

1 – Does not build rapport when speaking with others. Often misunderstands what others are saying, leading to mistakes on the job. Unprofessional demeanor in groups. Uses unacceptable language and /or jokes when speaking.

Self Management

- Adapts to changing Guest/company needs
- Copes with stress or pressure so it is transparent to Guest or co-worker
- Asks for help when needed
- Uses a sense of humor when appropriate
- Remains calm and keeps others calm

5 – Always follows FRC guidelines. “Walks the Talk”. Is positive about change. Asks for help when needed. Has a calming effect with self and others.

3 – Handles stress well, leads employees when under pressure. Balances difficult workload with other responsibilities. Holds others accountable when necessary.

1 – Is a procrastinator. Not a leader of change. Looks out for self vs. company. Does not ask for help, tries to do everything him/her self.

Sensitivity & Credibility

- Demonstrates compassion without reservation
- Puts others first
- Interacts with others in a way that gives them confidence in their intentions
- Respects others and their differences

5 – Exceptionally dedicated and sensitive to employee needs. Excellent mentor to employees. Has the loyalty and support of staff. Excellent team leader.

3 – Appropriately trains staff. Acknowledges and rewards good performance. Sensitive to the needs of others and the restaurant, well respected among peers and staff.

1 – Can be harsh and degrading at times. Thinks about self before others. Hoards information, does not respect confidentiality issues.

Courage, Edge, Tenacity and Drive

- Focuses on desired end result and overcomes obstacles to achieve results
- Perseveres and is tenacious until results are achieved
- Recognizes and capitalizes on opportunities
- Tries new things to reach challenging goals and persists until personal and team goals are achieved and commitments met

5 – Always seeking ways to show initiative. Knows how and when to take action. Knows what it takes to get the results wanted. Takes opportunities and runs with it.

3 – Seeks opportunities for advancements. Takes on other responsibilities to help team meet goals and commitments. Is slightly reserved and could be more tenacious.

1 – Is complacent. Has to be told what to do and how to overcome obstacles. Gives up easily under pressure.

Sense of Urgency

- Is efficient.
- Able to persist despite obstacles.
- Committed to getting results.
- Insistence in seeing things through.

5 – Always seeking ways to show initiative. Knows when and how to take action. Shows strong initiative in every situation.

3 – Takes initiative when appropriate. Comfortable making decisions to solve problems. Stays calm in stressful situations. Can take initiative when called for.

1 – Does not take initiative to resolve issues. Needs to be told everything step by step. Waits until directed to act. Becomes stressed in busy/ hectic situations.

Financial Results

- Understands the need to control costs and increase income.
- Adheres to FRC guidelines for purchasing agreements.
- Knows labor expectations and plans accordingly each schedule and each shift.
- Understands income and expense information and its implications, for area of responsibility, restaurant and company.

5 – Anticipates financial problems before they occur. Involves managers and staff in financial improvement initiatives. Provides meaningful information to decision makers.

3 – Understands and uses standard accounting practices. Follows standard financial practices. Accurately reports financial status of restaurant. Could better understand how to control labor cost.

1 – Does not inform supervisors of potential problems. Does not accept responsibility for financial problems in area of responsibility. Does not adhere to FRC guidelines.

SUCCESSFUL APPRAISAL GUIDELINES

Most successful annual performance appraisals have one thing in common: they were carefully planned and prepared for. It's not just a matter of filling out the appraisal form and scheduling a meeting. Managers need to take time to carefully prepare for the process. Here is a checklist of items that should be considered to prepare for a successful performance appraisal.

What is the best way to prepare the Performance Appraisal?

- Base it on observable performance events.
- Evaluate specific behaviors and not general impressions.
- Consider the full range of relevant behavior.
- Refer to the quarterly appraisals for specifics.
- Make fair and consistent evaluations between managers.
- Apply the same standard of performance.
- Address opportunity areas for improvement.
- Remember that performance management is an ongoing activity, and the appraisal is to represent the total evaluation period.

How can I make the process a success?

- Set objectives.
- Focus on top priorities.
- Clarify work to be accomplished and the expected outcomes.
- Ensure accountability.
- Ensure alignment to achieve financial, operational, and organizational goals.

What best practices can I use?

- Review rating definitions.
- Build on strengths.
- Use "we" approach when discussing problems.
- Be specific.
- Keep the meeting on track.
- Ask open ended questions, then listen.
- Talk about results.
- Function as a coach.
- Close discussion properly and summarize objectives on the Action Plan.

What should I not do?

- Use negative words or too many criticisms.
- Use "you vs. me" approach.
- Give insincere or excessive praise.
- Use generalities that can't be backed up by specifics.
- Dominate the conversation.
- Place emphasis on personality traits.

Where should I conduct the Performance Appraisal?

- Identify a location outside of the restaurant – if possible (this way you have less of a chance to be interrupted).

How much time should I spend?

- It is important to have enough time to make this a meaningful experience. 1 hour is recommended.

What questions can I ask about Succession Planning?

- Where do you see growth opportunities?
- What future roles might you consider?
- What work experiences will help you develop?
- What do you consider some of your development needs?
- What barriers to development might occur?
- What is important to you in terms of work?
- What are your short and long-term expectations about career growth?

Final Words

- Spend the right amount of time – Every manager is entitled to a thoroughly completed performance appraisal, not a rush job!
- Be careful not to be overly influenced by recent performance – take into account the entire performance period.
- Don't let positive financial results overshadow competence deficiencies.
- Avoid rating a manager too high to avoid uncomfortable discussion of development needs.
- Be careful with setting inappropriate expectations – career advancement or compensation.

DEVELOPMENT ACTION PLAN

The purpose of the Development Action Plan is to help the manager improve on the skills that are important to the position or to help the manager develop into a new role.

How to establish a Development Action Plan:

Using career goals as a guide, identify the skills and competencies that need to be developed. Together with your supervisor, map out the on-the-job learning and leadership activities and/or training you will engage in, to develop those skills and competencies. Brainstorm the resources that will be needed for success. Write out the action steps that will be needed to complete the activities.

Area of Focus = What is the specific behavior or issue that requires improvement or mastery i.e. organization, communications with staff, management of employee files, etc.

Development Goals = What is expected to be accomplished in the allotted time frame.

Actions to be Taken = Steps that are required of manager to improve or master performance.

Time Frame = Brief, reasonable period of time for manager to make adjustments. Should range 30 days to 60 days.

Manager Name: _____ **Title:** _____

Date: _____ **Location:** _____

| Areas of Focus | Development Goals | Actions to be Taken | Time Frame |
|--------------------|--|---|------------|
| | | | |
| Bar Staff Training | <ul style="list-style-type: none"> • 100% Specialty Drink Knowledge • 100% White Wine Knowledge • 100% Red Wine Knowledge | <ol style="list-style-type: none"> 1. 1 on 1 with bartender, practicing specialty cocktails 2. Daily knowledge tests 3. Set up wine class with Regan | 30 days |

DID YOU KNOW?

| Successful Managers..... | Unsuccessful Managers..... |
|---|---|
| Communicate effectively. | Provide poor direction and feedback to employees. |
| Build and maintain mutually respectable and rewarding relationships with employees. | Are insensitive and unaware of employees needs. |
| Enforce standards and lead by example. | Are too authoritarian or too lax. |
| Know when and how to delegate. | Try to do it all themselves. |
| Provide on – going coaching and training. | Rush instructions and expect employees to get it. |
| Lead and motivate their team to exceed goals. | Allow negativity among their team. |

Feedback to employees, both positive and critical, about significant behaviors can enhance employee motivation to improve.

Number 1 Reason People Leave Their Job

- o Bad boss or immediate supervisor.

Other Reasons

- o Management doesn't take the time to clarify goals and decisions.
- o Favoritism.
- o Management promotes someone who lacks training and or necessary experience.

Conflict is a normal and natural part of personal and work lives, still most people fear it and want to avoid it all costs. Whether it is an upset Guest whose expectations went unmet, an employee with a bad attitude or a peer with a different perspective, it is important that you face the situation. When handled in the correct way, conflict can be highly productive. To do this, start by learning to have difficult conversations skillfully. You will be successful if you are mindful in your approach, are open minded and take others perspectives into consideration. Unresolved conflict can create tension which lessens productivity and can be devastating to the culture and environment of your restaurant. Ignoring a problem or avoiding an uncomfortable conversation will only lead to problems.

Resolving conflict is not only critical to your success as a manager, but managing it successfully is often very productive as it increases awareness and provides opportunities for growth and change.

TRICKS OF THE TRADE

- ✓ Take care of disciplinary problems promptly – tardy, etc.
- ✓ Focus on development needs – what will make the individual stronger.
- ✓ Communicate with employees daily.
- ✓ Be honest.
- ✓ Be consistent.
- ✓ When giving feedback to an employee be specific.

Note: *This applies to feedback given outside of scheduled performance appraisals and feedback that may be the basis for termination.*

When giving feedback - keep in mind these key ideas.
A good rule of thumb - Praise in public and criticize
in private.

NOTES

NOTES

“GREAT HOSPITALITY EVERY TIME”



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