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| Humber_Black_PC Office of Human Resources SUPPORT STAFF **PERFORMANCE REVIEW** |

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| **GUIDELINES FOR MANAGERS**  **OBJECTIVE**  Progress reviews are intended to provide constructive performance feedback to assist with planning, meeting objectives and helping employees to attain their goals. Day to day coaching is a vital function of every supervisor, and as such daily discussions should occur on immediate issues. The purpose of an annual, formal Performance Review is to provide an opportunity for a comprehensive discussion of overall performance, over the course of the year (by comparing RESULTS OBTAINED to RESULTS EXPECTED), so that a formal effort is made to help employees to continually improve their performance.  **PREPARATION**  Careful preparation is essential to an effective Performance Review discussion, which should be carried out without distractions or interruptions. In addition, the employee should be given at least one week’s notice of a Performance Review discussion to have time to prepare.  Before you begin, you should review the employee’s job description, the previous development plan (if one exists), detail any tasks, projects or objectives that were assigned during the past year.  **FOLLOW UP**  You should follow up (at regular intervals) progress against the development plan which has been established for the employee. As outlined on the development plan, both the employee and the supervisor have specific responsibilities towards accomplishing the approved plan.  **INTERVIEW GUIDELINES AND PROCESS**  1. Offer the employee an opportunity to complete a draft of their review before the interview to serve as a basis for  discussion.  2. Accentuate the positive. However, it is important to note if there are performance concerns at the time of the review.  3. Support statements about performance/behaviour with documentation. Encourage employee to talk about their performance.  4. Set realistic goals.  5. Be aware of: Personal Biases; Criticism of personality traits; Unrealistic standards/expectations.  6. Monitor proposed development plans and goals.  7. Work from a draft at the meeting. Incorporate additional comments during the meeting in the final report.  8. Complete the progress review by filling in the form or preparing a separate memo following the memo format.  9. Obtain senior manager’s approval of assessment.  10. Provide a copy to the employee and send a copy to the Human Resources department for the employee’s file.  It is important to note whether or not there are performance concerns at the time of the review. However, the note should be summary in nature and only reflective of what has been or will be addressed outside of the formal performance review.  **FILING**  Progress reviews are kept on file for 3 years. |

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| **Office of Human Resources** SUPPORT STAFF **PERFORMANCE REVIEW** |
| **Date:**    **Name:**  **Department/Division:**    **Position Title:**  **Starting Date in Present Position:**    **Completed By:**  **Date of Last Performance Review:**  **Date of Last Position Description Form (PDF) Update:** |

1. **REVIEW AND SUMMARY OF OVERALL**

**GENERAL PERFORMANCE**

(Briefly comment on the Following)

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| **DUTIES/TASKS (in previous year)**  Review the employee’s position description to ensure it is current.  List the employees major job duties or tasks, projects or objectives assigned during the past year (use job description as a guide) | **COMMENTS**  Comment on the employee’s **overall** performance level, i.e., exceptional, above average, average, satisfactory, needs improvement, unsatisfactory. You may use all or some of the following criteria: quality of work; productivity; deadlines; use of initiative; problem-solving; customer-service, etc. |
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| **B. Major Strengths**  What part of the job does the employee do best? (Limit the list to not more than four specific responsibilities, skills or particular activities within those responsibilities). Specific reference should be made to Section A. Provide supporting examples if possible.  1      2.  3.  4. |

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| **C. Achieved Goals And Objectives**   |  |  | | --- | --- | | Outline goals & objectives from last review. | Did the employee attain the goals? If not, why not.  What progress has been made towards attaining the goals? | | |
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| **D. Future Goals & Objectives**  Specify no more than four (4) goals and objectives for the next year. You may include items which relate to a responsibility which will be encountered in the next position, or areas of strength which can be improved upon further.  1.  2.  3.    4. |

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| **E. Training/Development/Coaching Plan**  Outline training or staff development needs and plans for the next year to meet corporate, departmental goals and individual career plans. Include specific skills or competency development needs:   |  |  |  |  | | --- | --- | --- | --- | |  | Objectives (Action to be taken by Employee) | Supervisor Responsible | Target Date for Completion | | CORPORATE TRAINING: |  |  |  | | DEPARTMENTAL: |  |  |  | | INDIVIDUAL: |  |  |  |   Please note: this section is carefully reviewed for input into the Corporate Staff Training Plan. |

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| **F. General Comments**  The space below is provided for a record of the results of the discussion, i.e., what other plans were made; what specific action is to be taken by both parties: |

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| **COMMENTS ON PROGRESS REVIEW PROCESS**  EMPLOYEE:  -----------------------------------------------------------------------------------------------------------------------------------------------------------------------  SUPERVISOR:  -----------------------------------------------------------------------------------------------------------------------------------------------------------------------  My performance review has been explained to me. I realize that signing this review does not necessarily signify agreement, but indicates that I have received a copy.  SIGNED:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Incumbent)  Please check one:  \_\_\_\_\_ I consider this evaluation to be fair.  \_\_\_\_\_ I wish to speak to a representative of Human Resources regarding this evaluation.  This employee’s individualized accommodation plan has been reviewed (Please check one)  Yes No Not Applicable  Notice: The employee’s rights concerning performance appraisals are found under Article 16.1 of the Collective Agreement. |
| **REQUIRED SIGNATURES (2 levels of Management)**  SIGNED: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Immediate Supervisor)  SIGNED: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DATE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  (Supervisor’s Supervisor)  **NOTE:** Please ensure that in addition to sending the completed form to Human Resources to be filed in the employee’s HR file, the employee’s supervisor/manager should also keep a copy within their own files.  c:\performance reviews\ssperfreview.doc |