



## EMPLOYMENT POLICY MANUAL

<b>Subject:</b> Performance Evaluation Summary	<b>Approval Date:</b> June 17, 2013	<b>By-Law No.</b> 1785-13
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### 3.9 PERFORMANCE EVALUATION SUMMARY

The Municipality has adopted a policy of administering performance reviews for all non-union employees. Performance reviews are designed to help keep employees on the right track with direction and goals that will lead to their continuous improvement and provide career advancement opportunities. Performance reviews assist in the identification of strengths and weaknesses in organizational abilities and capacities that will aid in the development of effective training, employee placements and productivity forecasts.

All non-union employees will be subject to annual performance reviews within the fiscal year. Reviews will be based upon performance standards, goals and objectives identified in employees' respective job descriptions.

#### 1. RATIONALE

Rationale for performance reviews are based on the following:

##### 1.1 Communication

The process is designed to facilitate two-way communication between employees and management regarding performance and personal development. All employees are encouraged to engage in open and honest dialogue both at the review meetings and all year round. There should be no surprises at the performance review meeting.

##### 1.2 Achievement of Municipal Objectives

The process draws attention to the contributions made, past and present, by every individual in achieving Municipal objectives. Setting objectives for future activity allows individual, team and/or departmental objectives to be aligned closely to the strategic and operational plans.

##### 1.3 Clarification of Work Responsibilities and Monitoring Performance

Performance reviews provide tools for the clarification of expectations and priorities, and for monitoring performance.

##### 1.4 Responsibility for Individual Performance and Development

The process is designed to give ownership for performance and development to individuals, whilst at the same time recognizing the important role of



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management in providing leadership, constructive feedback, guidance and support.

### 1.5 Straightforward and Streamlined Procedure

The performance review process is designed to be user-friendly. This will help ensure that the process is non-discriminatory, transparent and consistently applied, but most importantly that all development activity is aligned with the strategic business objectives.

### 1.6 Continuous Improvement

The process is intended to promote continuous improvement in personal competence and work performance, and facilitate the achievement of this by means of agreed action plans and objectives.

### 1.7 Accessibility

The process takes into account the accessibility needs of employee with disability, as well as individual accommodation plans, when conducting performance management, providing career development and advancement to employees.

## 2. PROCEDURES

2.1 Review the goals and objectives (performance standards) in the job description.

2.2 A joint performance review meeting between supervisor and staff is scheduled to:

- Discuss the assessments;
- Identify specific objectives for further development;
- Develop a professional development plan;
- Review policy and guidelines.

2.3 Negotiate recommendations based on this discussion that include:

- Identified actions needed to meet the objectives;
- Time frame;
- Training and resources needed for expected level of performance.

The related appraisal documents are located in APPENDIX A (attached).



**Section I – Setting Objectives**

**Directions:**

**Step One:** Setting Objectives – At the beginning of the review period, meet with your employee to set performance objectives. Make sure the objectives are specific, measurable, agreed upon, realistic and time based. List performance objectives in the space provide below.

**Step Two:** At the end of the review period rate performance for each of the mutually pre-established objectives using the definitions on page 1. Provide specific accomplishments, results, examples and/or areas needing improvement. Meet with the employee to discuss.

**Step One: Objective A**

**Step Two: Performance Review – Accomplishments/Results/Examples**

Rating ( )

**Step One: Objective B**

**Step Two: Performance Review – Accomplishments/Results/Examples**

Rating ( )

**Step One: Objective C**

**Step Two: Performance Review – Accomplishments/Results/Examples**

Rating ( )

**Step One: Objective D**

**Step Two: Performance Review – Accomplishments/Results/Examples**

Rating ( )

## Section II – Behavioral Standards

**Directions:**

- At the beginning of the review period meet with the employee to communicate expected behavior standards.
- At the end of the review period, determine a rating for each behavioral standard using the definitions on page 1. Meet with the employee to discuss and record comments.

<b>Interpersonal Relations (Internal and External)</b>	Tries all possible ways to solve problems before referring to others and keeps individuals informed of the status. Tries to go beyond what is required. Always seeks ways to improve relationships. Contributes to a positive working relationship with others and is a constructive team member. Effectively manages conflict and confrontation, while respecting the views of others.	Rating ( )
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**Comments:**

<b>Respect For Others</b>	Listens to developmental feedback non-defensively and gives feedback in a constructive manner. Shows appreciation of effort of others. Expresses disagreement tactfully and sensitively. Demonstrates consideration for the feelings of others.	Rating ( )
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**Comments:**

<b>Teamwork</b>	Openly shares information with others and asks others how they can help if required. Willingly puts team goals ahead of individual goals. Compromises with others to get the job done. Works with others to solve problems/create solutions.	Rating ( )
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**Comments:**

<b>Initiative</b>	Challenges the “way it has always been done” and generates ideas and innovative solutions. Conveys a sense of urgency when appropriate. Seeks new work challenges beyond own responsibilities and takes immediate and independent action when needed.	Rating ( )
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**Comments:**

<b>Section II – Behavioral Standards - Continued</b>		
<b>Professionalism</b>	Uses feedback from others in a professional manner. Able to separate personal and professional issues. Maintains effective performance in uncertain or unstructured situation, or under unusual pressure. <b>Contributes to a positive work environment and holds to the highest standards of performance.</b>	Rating ( )
<b>Comments:</b>		
<b>Quality</b>	Produces results that consistently meet or exceed expectations. Accepts responsibility for successes and failures. Checks work to ensure accuracy and quality and makes decisions based on facts.	Rating ( )
<b>Comments:</b>		
<b>Work Ethic</b>	Strives to set high goals and/or standards. Modifies behavioral style and approach to reach a goal. Originates action and maintains active attempts to achieve goals; self-starter rather than passively accepting.	Rating ( )
<b>Comments:</b>		
<b>Communication – Verbal</b>	Expresses himself / herself effectively in individual or group situations and demonstrates effective listening skills (includes organization, gestures and non-verbal communication). Participates in and contributes at meetings.	Rating ( )
<b>Comments:</b>		
<b>Communication - Written</b>	Demonstrates the ability to organize and present ideas in a meaningful, grammatically correct written format. Prepares the required documentation and follows timely reporting procedures.	Rating ( )
<b>Comments:</b>		

**Section III – Leadership Competencies**

<b>Directions:</b>		
<ul style="list-style-type: none"> <li>• At the beginning of the review period meet with the employee to communicate expected leadership competencies.</li> <li>• At the end of the review period, determine a rating for each competency standard using the definitions on page 1. Meet with the employee to discuss and record comments.</li> </ul>		
<b>Sets Vision and Direction</b>	Quickly develops and champions a compelling analysis/vision of what needs to be done that is consistent with the available information and is readily understood.	
<b>Comments:</b>		Rating ( )
<b>Planning/ Organizing/ Control</b>	Systematically structures and plans work; establishes priorities; forecasts future needs and anticipates problems, effectively utilizes time and resources. Establishes procedures, monitors accomplishments and results and conducts follow-up on a continuous basis so that objectives are met.	
<b>Comments:</b>		Rating ( )
<b>Drives for Results</b>	Consistently and vigorously holds self and others accountable for meeting goals and performance levels that are critical for the long-term health of the municipality.	
<b>Comments:</b>		Rating ( )
<b>Capitalizes on Change</b>	Aggressively changes current structures, processes and individuals perspectives to better utilize resources and take full advantage of opportunities.	
<b>Comments:</b>		Rating ( )
<b>Leadership</b>	Provides positive direction and inspires or stimulates the best efforts of others in accomplishing goals; generates cooperation and commitment from others earns the respect and confidence of others	
<b>Comments:</b>		Rating ( )
<b>Builds High Performance</b>	Chooses, develops and motivates individuals and teams capable of exceptional levels of performance over extended periods of time.	
<b>Comments:</b>		Rating ( )

<b>Section III – Leadership Competencies - Continued</b>	
Identifies Issues and problems, gathers and assimilates information and diagnosis situations correctly.	
<b>Comments:</b>	Rating ( )
Considers alternative courses of action and draws logical conclusions that reflect factual information (quality and decision)	
<b>Comments:</b>	Rating ( )
Demonstrates readiness to make decisions, render judgements, takes action or commits oneself.	
<b>Comments:</b>	Rating ( )

**Section IV – Position Related**

**Directions:**

- At the beginning of the review period meet with the employee to communicate expected performance levels.
- At the end of the review period, determine a rating for each competency standard using the definitions on page 1. Meet with the employee to discuss and record comments.

<b>Job Knowledge</b>	Knows the mandate, policies and procedures of the employer, demonstrates good technical and background knowledge in area of expertise or training. Knows work duties and tasks.	
<b>Comments:</b>		Rating ( )
<b>Job Skills</b>	Willing to learn and apply new knowledge and skills, adapts to changing work situations and makes sound and timely decisions. Works with level of autonomy appropriate to training, experience and nature of job. Works accurately and efficiently.	
<b>Comments:</b>		Rating ( )
<b>Job Tasks</b>	Performs required duties and tasks specified in job description, plans and coordinates duties and tasks, while following the policies and procedures manual. Completes assignments on time.	
<b>Comments:</b>		Rating ( )
<b>Work Process / Problem Solving</b>	Collects all data pertinent to a situation/problem and analyzes this data to develop an understanding of the situation/problem. Develops a work plan to address and implements the strategies/methods to address the situation/problem.	
<b>Comments:</b>		Rating ( )
<b>Attendance / Schedule</b>	Does he or she manage their time effectively and is punctual and show responsibility in attendance.	
<b>Comments:</b>		Rating ( )
<b>Health and Safety</b>	Works in a safety conscious manner and reports and addresses unsafe conditions.	
<b>Comments:</b>		Rating ( )

<b>Section IV – Position Related - Continued</b>	
<b>Accountability</b>	Follows through with directives, tasks and decisions. Uses established procedures to address issues.
<b>Comments:</b>	Rating ( )

<b>Section V – Supervisory Criteria</b>	
<b>Directions:</b>	
<ul style="list-style-type: none"> <li>• At the beginning of the review period meet with the employee to communicate expected performance levels.</li> <li>• At the end of the review period, determine a rating for each competency standard using the definitions on page 1. Meet with the employee to discuss and record comments.</li> </ul>	
<b>Leadership</b>	Does the employee consistently demonstrate his/her ability to lead others? Does the employee motivate others to perform better? Does the employee have the respect of his/her work group? Also consider the ability to direct others towards a common goal.
<b>Comments:</b>	
Rating ( )	
<b>Organizational and Planning Abilities</b>	How well does the employee plan and organize work duties? Does the employee coordinate well with other workers and departments? Does the employee establish priorities appropriately; anticipate future needs?
<b>Comments:</b>	
Rating ( )	
<b>Task Delegation</b>	<b>HOW WELL DOES THE EMPLOYEE OVERSEE THE WORK AND DIRECTION OF SUBORDINATES? ARE DUTIES ASSIGNED APPROPRIATELY? DOES THE EMPLOYEE SELECT THE RIGHT KIND OF STAFF AS APPROPRIATE TO THE TASK AT HAND?</b>
<b>Comments:</b>	
Rating ( )	
<b>Administrative Skill</b>	To what extent does the employee manage day-to-day administrative duties? Does the employee ensure that organizational policies are adhered to? Does the employee make the appropriate utilization of company budget, equipment, and resources?
<b>Comments:</b>	
Rating ( )	
<b>Supervision</b>	Does he or she participate in the supervision process? Do they receive and act upon feedback from their supervisor and peers in a constructive manner. Do they take responsibility for learning and professional development?
<b>Comments:</b>	
Rating ( )	
<b>Staff Management</b>	Is the employee a positive role model for peers and/or subordinates? Does the employee provide constructive guidance and feedback to others? Does the employee assist other workers in accomplishing their own goals, duties, objectives?
<b>Comments:</b>	
Rating ( )	

**Section VI – Goal Completion**

**Directions:**

- List and discuss the goals set forth for this employee during the period under review. Identify those areas of responsibility where the employee did/did not meet performance goals and/or project milestones.
- Evaluate the progress made by the employee on predetermined goals, projects, job duties, and special assignments by selecting the appropriate box below each goal listed.

**Goal #1**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Goal #2**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Goal #3**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Section VII – Goal for Next Review Period**

**Directions:**

- List any goals, projects, job duties, and special assignments to be continued and/or completed in the coming year. Set these goals with the understanding that corporate priorities are subject to change as business situations change.
- Update this section as necessary throughout the next review period.

**Goal #1**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Goal #2**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Goal #3**

**Satisfactory Progress** \_\_\_\_\_

**Unsatisfactory Progress** \_\_\_\_\_

**Section VIII – Employee Signoff**

I have been advised of my performance rankings. The rankings and comments in this review have been discussed and explained to me by my supervisor. I understand the implications of poor performance and of the consequences of failing to improve my performance. My own comments are as follows:

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**Employee Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Part I – Compensation Recommendation**

As the supervisor, I am recommending the following wage increase as per the approved wage scale for the review period and offer the following comments:

\_\_\_\_\_ %

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**Supervisor's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_