# Steps for Completing & Using the Performance Assessment Form

The Supervisor sends an electronic copy of the form to the staff member at least two weeks prior to the scheduled Performance Review meeting and requests that they complete the assessment by a specified date and return it to the Supervisor.

The staff member completes and electronically submits the form at least one week prior to the scheduled Performance Review meeting. The staff member should also spend some time considering the overall performance rating they achieved over the course of the year.

The Supervisor considers the employee’s self-appraisal and provides their comments on the document.

A face to face performance assessment discussion is conducted. During the meeting, the Supervisor shares their comments and engages the employee in a conversation regarding the comments and goal achievement. The focus of the conversation should be to work towards a shared understanding of the attainment of the work and development objectives and outcomes.

The Supervisor and employee may also use this time to work together to draft the Performance Dialogue Worksheet which documents agreed upon work goals and objectives for the coming year.

The Supervisor and the employee will also discuss the overall performance rating and aim to come to a common understanding about the employee’s progress and performance over the review period.

Both the employee and the Supervisor sign the form, indicating that the employee has had the opportunity to discuss his or her performance. Should the employee and The Supervisor not be able to reach agreement on the overall assessment, the employee’s signature on the form is still required and Human Resources may be consulted for further guidance.

An electronic and hard copy version of the form should be retained on file by the Supervisor. The Supervisor is to provide the employee with an electronic copy of the completed form.

# Performance Assessment Form

For General Use

|  |  |  |  |
| --- | --- | --- | --- |
| **Name:** |  | **Employed Since:** |  |
| **Department:** |  | **Supervisor:** |  |
| **Current Position/Title:** |  | **Length of Time in Current Position:** |  |
| **Job Fact Sheet:** | Still Relevant ☐ | Requires Updating: ☐ | |
| **Date:** |  |  |  |

# Job Components & Objectives

List the 3-5 major components of your job (e.g. student guidance, financial accounting, technical documentation). Where applicable, identify the objectives or areas for improvement or development that were noted last year within each of those components.

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| --- | --- |
| **Job Component** | **Objectives and/or Areas for Improvement or Development** |
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|  |  |

# Year in Review

Please answer the following questions.

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| --- |
| 1. **List your most significant accomplishments over the last year as they relate to the major job components, the objectives that were set, and/or the areas for improvement or development that were identified for the past year.** |
|  |
| **Manager’s Comments:** |
|  |
| 1. **Identify all other contributions you would like to note.** |
|  |
| **Manager’s Comments:** |
|  |
| 1. **List any special accomplishments, awards, activities or recognition (on or off the job) over the past year that you would like noted.** |
|  |
| **Manager’s Comments:** |
|  |
| 1. **What challenges have you experienced which made it difficult for you to carry out your work responsibilities over the past year?** |
|  |
| **Manager’s Comments:** |
|  |
| 1. **In what areas do you think you need added support, structure, direction or clarity of expectation?** |
|  |
| **Manager’s Comments:** |
|  |

# Planning for Next Year

|  |
| --- |
| 1. **What work objectives do you think we should set for next year?** |
|  |
| **Manager’s Comments:** |
|  |
| 1. **What learning and development goals do you have to: a) enhance current skills and knowledge, or b) prepare you for future needs or career opportunities?** |
|  |
| **Manager’s Comments:** |
|  |

Note: To document agreed upon work goals and objectives for the coming year, please use the Performance Dialogue Worksheet.

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| **Notes and/or additional comments:** |
|  |

# Overall Performance Rating - For Manager’s Use Only

Overall, how well did the results achieved match the expectations and goals of the role for the period under review? This rating reflects one year’s performance only; performance levels can vary from year to year for a variety of reasons.

|  |
| --- |
| **☐ Unacceptable Performance**  Rarely achieved expected outcomes and standards of performance in many aspects of the job. Therefore, significant improvement is needed and major remedial development is required to ensure job expectations are met. This situation needs to be addressed immediately with a clear action plan to assist the employee to make major improvements within a defined time period. |
| **☐ Acceptable Performance**  Sometimes achieved a number of the core quantitative and qualitative outcomes of the job; there was some significant inconsistency in quality and/or quantity and/or difficulty with expected behaviours and practices. This situation needs to be addressed with a clear action plan to assist the employee to fulfill all job expectations within a defined period of time. |
| **☐ Good Performance**  A valued, dependable performer and a positive contributor. Usually achieved the expected outcomes to the expected standards of quality and quantity; demonstrated good work practices and could be counted on to deliver good quality work. |
| **☐ High Quality Performance**  A valued, high-achieving performer. Consistently achieved expected outcomes, often above the standards of quality and quantity; demonstrated added skill in daily work practices and contributed in significant ways to improvements and new initiatives. |
| **Comments:** |

|  |  |  |  |
| --- | --- | --- | --- |
| Manager’s Signature: |  | Date: |  |
| Employee’s Signature: |  | Date: |  |