

# ***CITY OF CHARLOTTETOWN POLICY***

## **EMPLOYEE ASSESSMENT AND DEVELOPMENT PLAN**

***Policy Number: A-HR-3***

***Originating Department: Human Resources***

***Approved By: CAO/Directors/Managers  
CAO/Directors***

***Date of Approval: February 21, 2006  
Amended: July 08, 2008***

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### **1.0 Purpose**

Performance evaluation at the City of Charlottetown is intended to be a constructive and positive experience. It is viewed as an opportunity for the employee to get to know where they stand relative to their job performance, goals and objectives. At the same time it offers employees a chance to become involved in determining their future career development, and to map out ways they can be true participants in the City's achievement of success.

### **2.0 Scope**

This policy is applicable to all employees of the City of Charlottetown.

Collective agreement language supercedes this policy wherever there is a conflict with the language.

### **3.0 Resources**

The performance evaluation tool, *Assessment and Development Plan*, instructions for Supervisors and Employees as well as the *Professional Development Plan Table* are attached as Appendices "A" – "D".

Police Officers will use the *Performance Evaluation Report* (not attached) and the *Seasonal/Casual Performance Evaluation Form* is attached as Appendix "E".

### **4.0 Policy**

4.1 The City of Charlottetown maintains a policy of evaluating the job performance of its employees as a means of measuring efficiency and effectiveness of the organization's operations and providing employees with meaningful information about their work. Specifically, performance evaluation is intended to:

4.1.1 Focus maximum attention upon achievement of assigned duties as listed in the job description;

- 4.1.2 Provide a tool which enables supervisors to accurately assess individual strengths and weaknesses and relate these assessments to current and future needs;
  - 4.1.3 Challenge employees to continually improve performance and personal effectiveness;
  - 4.1.4 Keep employees continually informed of their successes and opportunities for improvement;
  - 4.1.5 Place primary emphasis on employee self-development and involve employees in the planning and implementation of career objectives.
- 4.2 The evaluation of each employee is intended to be participatory in nature, involving the employee's input as much as the Direct Supervisor (Appendix "B" and "C" - Instructions for Supervisors and Employees).
  - 4.3 Evaluations are conducted annually, or more frequently as deemed appropriate by the Direct Supervisor and/or Department Head.
  - 4.4 Employees will receive a copy of all completed documents and originals will be kept in their personnel file.
  - 4.5 Each formal performance evaluation is thoroughly discussed with the employee to point out both areas of successful performance and areas that need improvement, or that are unacceptable. Each employee is encouraged to comment about their work performance, in writing and verbally.

## **5.0 Probationary Period**

- 5.1 All new permanent employees hired by the City shall be on probation for the first six months of their permanent employment, during which time their performance shall be evaluated by the City.

In order to become a permanent employee of the City, the employee must be notified that they have successfully completed their probationary period. Any employee who does not successfully complete their probationary period shall be notified that their employment is being terminated (Appendix "F" – Probation Report).

- 5.2 The probationary period provides the employee and employer with a mutual period of evaluation. It gives the employee a chance to decide whether they are going to like working for the City of Charlottetown and it allows the employer time to decide whether the employee's work habits, performance, attitude meet satisfactory requirements.

**APPENDIX "A"**  
**PERFORMANCE EVALUATION FORM**

Employee Name:		Department:					Date:			
Job Title	Date Started in Title		<input type="checkbox"/> Annual <input type="checkbox"/> Probationary		Evaluation Period:					
						From: _____ To: _____				
<b>CRITERIA FOR ASSESSMENT MEASURE</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>1. Needs Development:</b> Reflects a fundamental or beginning level of performance and needs continued development. <b>2. Developing:</b> Reflects progress and is approaching job proficiency. <b>3. Proficient:</b> Has achieved proficiency. Meets standard job requirements. <b>4. Advanced:</b> Has detailed knowledge of job and exceeds expectations. <b>5. Outstanding:</b> Highest level of performance. Requires little supervision.				
<b>JOB KNOWLEDGE AND SKILLS</b>					<b>COMMENTS</b>					
Policies, procedures, regulations										
Technical skills related to job										
Works within scope of job description										
Continues to learn and develop skills and expertise										
<b>QUALITY OF PERFORMANCE</b>										
Thoroughness, neatness, attention to detail										
Accuracy, avoidance of errors, check work										
Asks for clarity when unsure										
Maintains quality in both slow and peak times										
<b>QUANTITY OF PERFORMANCE</b>										
Meets deadlines, completes tasks in a timely manner										
Prioritizes and organizes work schedules										
Successfully juggles multiple tasks										
Effectively uses time and other resources										

CRITERIA FOR ASSESSMENT MEASURE	1	2	3	4	5	1. <b>Needs Development:</b> Reflects a fundamental or beginning level of performance and needs continued development. 2. <b>Developing:</b> Reflects progress and is approaching job proficiency. 3. <b>Proficient:</b> Has achieved proficiency. Meets standard job requirements. 4. <b>Advanced:</b> Has detailed knowledge of job and exceeds expectations. 5. <b>Outstanding:</b> Highest level of performance. Requires little supervision.
<b>SELF-MANAGEMENT</b>						
Maintains confidentiality and security of Information						
Attendance (manages leave time effectively to minimize impact on department)						
Punctuality						
<b>CUSTOMER SERVICE</b>						
Consistently provides informed quality service						
Promptly responds to inquiries and requests						
Treats external and internal customers with courtesy and respect						
Displays a willingness to seek solutions to customer needs						
Approachability and ease of contact						
<b>TEAM SUPPORT</b>						
Shares information and expertise with others						
Accepts suggestions and criticism in a cooperative and positive manner						
Assumes fair share of workload and is flexible in scheduling						
Contributes to development and implementation of department goals						
Treats others in the work unit and the Corporation with dignity, fairness, and respect						
<b>SPECIFIC JOB CRITERIA</b>						
<b>OVERALL APPRAISAL</b>						





# Plus/Delta Form

(Complete prior to evaluation interview)

SUPERVISOR

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Department: \_\_\_\_\_ Rating period: \_\_\_\_\_ Date: \_\_\_\_\_

PLUS +	DELTA Δ
<b>List all areas of success and significant progress.</b>	<b>List any aspect of the employee's work, which may require changes and/or improvement.</b>

\*Attach to Evaluation form

# Plus/Delta Form

EMPLOYEE

(Complete prior to evaluation interview)

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Department: \_\_\_\_\_ Rating period: \_\_\_\_\_ Date: \_\_\_\_\_

PLUS +	DELTA Δ
<b>List all areas of success and significant progress.</b>	<b>List any factors that may be limiting your ability to do your job and effectively serve your customers.</b>

\*Attach to Evaluation form

## **APPENDIX "B"**

### **SUPERVISOR INSTRUCTIONS**

#### **INTRODUCTION**

Perhaps the most significant benefit of appraisal is that, in the rush and bustle of daily working life, it offers a rare chance for a supervisor and subordinate to have "time out" for a one-on-one discussion of important work issues that might not otherwise be addressed.

Almost universally, where performance appraisal is conducted properly, both supervisors and employees have reported the experience as beneficial and positive.

Appraisal offers a valuable opportunity to focus on work activities and goals, to identify and correct existing problems, and to encourage better future performance. Thus the performance of the whole organization is enhanced.

For many employees, an "official" appraisal interview may be the only time they get to have exclusive, uninterrupted access to their supervisor. The value of this intense and purposeful interaction between a supervisor and his/her employee should not be underestimated.

#### **ASSESSMENT AND DEVELOPMENT PROCESS**

##### **1. Preparing for the Interview**

- Notify the employee (usually in writing) of the time and place of the meeting several days in advance.
- Provide the employee with the "Employee" copy of the *Plus/Delta* form, prior to the interview. Instruct them to write down any information that they feel may be pertinent to a discussion of the areas referred to on the form.
- Review the employee's job description and any written records or materials relevant to the employee's past performance, including recommendations/ goals from the last assessment and development interview and the appropriate job description.
- Solicit the opinions of other supervisors and managers with whom the employee has regular contact regarding how their performance has improved, declined, or otherwise measured up to established standards.
- Complete the "Supervisor" copy of the *Plus/Delta* form and bring to the interview.
- Complete the form by marking the individual rating boxes below each of the performance measurement categories as well as the overall performance rating box. Complete the Specific Job Criteria category, if applicable.

## 2. Conducting the Interview

- Select a place that is private and quiet, where you will not be interrupted.
- Establish an open, friendly atmosphere in which both parties can express themselves freely and without fear of triggering an angry or defensive reaction.
- Be aware of any feelings, attitudes, or problems of your own that may be influencing your reactions to your employee.
- State why the discussion is taking place (even though you both already know).
- Explain how the interview will be handled and what role each of you will play.
- Emphasize the importance of two-way communication and listen intelligently, understandingly, and skillfully to the employee's point of view throughout the interview.
- Criticize constructively – you should point out opportunities for improvement not to condemn but to help improve. Be specific and relate your feedback to the job.

## 3. Joint Assessment

- Using the *Plus/Delta* forms compare the employee's analysis of the assessment and development period with yours. Discuss the comparison and try to agree on what (if anything) should be done differently. It may not be possible to reach total agreement on all points, but it is important that you both reach an understanding of the other person's views.
- The supervisor may schedule a mid-term progress meeting.

## 4. Developing Recommendations

- Together with the employee, after a review of the *Plus/Delta*, develop an action plan to accomplish the recommendations for the next assessment and development period. The action plan should cover the following points:
  - What steps the employee can take to build on their strengths;
  - What specific steps can be taken to improve performance in weak areas;
  - How much improvement in specific areas of performance should be achieved and within what time frame;
  - What can be done if problems are encountered in achieving these goals between

now and the date of the next assessment and development;

- What support the supervisor/manager can provide to help the employee successfully complete his/her action plan.

- Record each specific recommendation on the form.

## **5. Progress Review**

- Set up a time for a mid-year progress meeting to review what has been achieved up to that point.
- Discuss any problems that have been encountered and what can be done to resolve them. The purpose of the progress review is to maintain the employee's motivation and to keep the goals realistic.
- Emphasize your availability for continuing guidance and resources.

## **PROFESSIONAL DEVELOPMENT PLAN**

- The *Professional Development Plan* is optional for non-supervisory employees and separate from the assessment process. It is a voluntary plan between the employee and supervisor/manager designed to detail ways to help the employee develop and grow professionally.
- The *Professional Development Plan* may be included in the employee's personnel file, and both parties should maintain copies.
- The development of a *Professional Development Plan* is a personal choice of the employee and no retaliation should be exhibited toward those employees who choose to not have a plan.
- The *Professional Development Plan* should be aligned with the employee's job description and the City and Department's mission (goals and objectives).

## **ONGOING COMMUNICATION WITH THE EMPLOYEE**

- A fundamental component of successful evaluation is regular communication between the supervisor and the employee. Building work relationships is essential to achieving desired results. Regular two-way communication between the employee and supervisor helps build this relationship.
- Brief discussions should take place whenever appropriate. Formal sessions should be scheduled at least once during the evaluation period, and preferably quarterly, to discuss what is going well and what can be improved.

- Use these sessions to describe rather than evaluate performance. Inquire about any changes in the work situation since the previous discussion. Determine if there are any obstacles blocking success. Ask about resources that the employee may need to accomplish their objectives. Acknowledge accomplishments during this period. Discuss new priorities in the department so the employee can re-focus efforts, if appropriate. Modify plans in response to changes.
- It is important for both parties (supervisor and employee) to maintain open communication in order to keep each other informed of work progress and work together to resolve problems when they occur. It is far better to resolve problems when they are small, before they become "disasters."
- A key principle that encourages employees to accept constructive criticism is to be "hard on the problem, and soft on the person." The focus should be on correcting the problem or behavior, not on punishing the employee. The performance evaluation is an assessment of performance and should not be punitive. The performance evaluation should not be the place where the employee first hears about disciplinary action.
- A useful motto for the performance appraisal should be "no surprises." Through this approach, you can reduce the likelihood of the employee becoming emotional during the review.
- Strive to provide continual feedback concerning expectations and performance. When things are going well discuss how and why this is so. When things are not going well discuss what needs to be done to make them right. When an employee is not doing things properly, get together and plan what needs to be done to correct the matter. If there is a performance gap, help the employee understand the cause and the action necessary for correction. Support plans for professional development.

By providing feedback on a continual and timely basis throughout the evaluation period, the supervisor establishes the groundwork for indicating that there is a performance problem.

## **PERFORMANCE MEASUREMENT GUIDELINES**

The following measurements should be considered in the assessment of an employee's performance of his/her duties and responsibilities:

1. **Job Knowledge:** Measurement should not be restricted to the technical knowledge an employee is required to bring to a specialized job. It is much broader and includes the range of pertinent policies, regulations, and procedures related to his/her assignment. It does not relate to the mental and/or physical skills required in a given position.  
Comments - Does the employee consistently demonstrate a proper level of job knowledge, prerequisites and the job specifications? Has the probationary employee acquired an acceptable level of job knowledge? Is the regular employee keeping up-to-date with changing policies and procedures and with technological advances in his/her occupational

field?

2. **Quality of Performance:** Measures the degree of excellence of the work performed over the entire rating period. Attention should be given to the consequences of poor quality of work.  
Comments - Is the employee's work neat, accurate, thorough, timely, and acceptable? Must the work be redone, thus reducing the potential volume of acceptable work which could have been produced? Do errors in the employee's work affect the efforts of others? Does poor work frequently reflect adversely upon the office, department, or college?
3. **Quantity of Performance:** Refers to the quantity of satisfactory work turned out during a given period of time. Does the employee consistently accomplish a full day's work? Does the employee produce enough work so that he/she is clearly an asset to the department?  
Comments - Short term exceptions to the quantity standard can sometimes be made. Care should be exercised to insure maximum quantity of departmental standards.
4. **Self-Management:** Measures effectiveness and willingness to take responsibility for managing time and resources, and taking maximum advantage of talents, skills and expertise.  
Comments - Does the employee prioritize his/her workload to accomplish the most important tasks first? Is the employee alert to changing conditions and/or departmental needs for flexibility? Does the employee comply with departmental and organizational policies and procedures? Is the employee consistently absent or tardy?
5. **Customer Service:** Measures the extent to which the employee exhibits the ability to be courteous, efficient, informed, available, tactful and diplomatic when representing the department and organization to internal and external customers.  
Comments - Does the employee treat internal and external customers in a professional manner? Does he/she look for positive solutions to solve internal and external customer problems? Does the employee often avoid contact with visitors to the office or on the telephone?
6. **Team Support:** Measures effectiveness in working with others and helping co-workers succeed; demonstrates the ability to be supportive and flexible, contributing to the overall success of the department and the organization.  
Comments - Does the employee approach challenges and problems in a positive manner and avoid negative influences among co-workers? Does he/she actively support the goals of the department and work to help the team succeed?
7. **Specific Job Criteria:** Measures those areas not included in the above categories that are specific to the performance of a particular job.  
Comments - Specifics may come from the job description, ADA form, or duties that are regularly carried out in the performance of job duties.

## **RATING GUIDELINES**

1. **Needs Development:** Reflects a fundamental or beginning level of performance and

needs continued development.

2. **Developing:** Reflects progress and is approaching job proficiency.
3. **Proficient:** Has achieved proficiency. Meets standard job requirements.
4. **Advanced:** Has detailed knowledge of job and exceeds standard job requirements.
5. **Outstanding:** Highest level of performance. Employee consistently demonstrates superior job performance in this position. Requires little supervision.

## **APPENDIX “C” EMPLOYEE INSTRUCTIONS**

### **ASSESSMENT AND DEVELOPMENT PROCESS**

#### **1. Preparing for the Interview**

- Your supervisor will notify you (usually in writing) of the time and place of the meeting no less than two (2) days in advance.
- You will be provided with the "Employee" copy of the *Plus/Delta* form prior to your interview.
- Complete the *Plus/Delta* form and bring it to the interview.
- Review any written records or materials relevant to your past performance, including recommendations/goals from the last assessment and development interview and the appropriate job description.

#### **2. Conducting the Interview**

- Your supervisor will strive to maintain an open and friendly atmosphere where both parties can express themselves freely.
- Two-way communication will be emphasized throughout the interview.
- The supervisor will review the rating boxes in each of the six performance categories as well as the overall appraisal rating.

#### **3. Joint Assessment**

- Using the *Plus/Delta* forms, compare the supervisor's analysis of the assessment and development period with yours. Discuss the comparison and try to agree on what (if anything) should be done differently. It may not be possible to reach total agreement on all points, but it is important that you both reach an understanding of the other person's views.
- The supervisor may schedule a mid-term progress meeting.

#### **4. Developing Recommendations**

- Together with the supervisor, after a review of the *Plus/Delta*, develop an action plan to accomplish the recommendations for the next assessment and development period. The action plan should cover the following points:

- What steps you can take to build on your strengths;
  - What specific steps can be taken to improve performance in weak areas;
  - How much improvement in specific areas of performance should be achieved and within what time frame;
  - What can be done if problems are encountered in achieving these goals between now and the date of the next assessment and development;
  - What support the supervisor/manager can provide to help you successfully complete your action plan.
- Record each specific recommendation on the form.

## PROFESSIONAL DEVELOPMENT PLAN

- The *Professional Development Plan* is optional for non-supervisory employees and separate from the assessment process. It is a voluntary plan between the employee and supervisor/manager designed to detail ways to help the employee develop and grow professionally.
- The *Professional Development Plan* may be included in the employee's personnel file, and both parties should maintain copies.
- The development of a *Professional Development Plan* is a personal choice of the employee and no retaliation should be exhibited toward those employees who choose to not have a plan.

## PERFORMANCE MEASUREMENT GUIDELINES

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Comments - Does the employee consistently demonstrate a proper level of job knowledge, prerequisites and the job specifications? Has the probationary employee acquired an acceptable level of job knowledge? Is the regular employee keeping up-to-date with changing policies and procedures and with technological advances in his/her occupational field?
2. **Quality of Performance:** Measures the degree of excellence of the work performed over

the entire rating period. Attention should be given to the consequences of poor quality of work.

Comments - Is the employee's work neat, accurate, thorough, timely, and acceptable? Must the work be redone, thus reducing the potential volume of acceptable work which could have been produced? Do errors in the employee's work affect the efforts of others? Does poor work frequently reflect adversely upon the office, department, or college?

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Comments - Short-term exceptions to the quantity standard can sometimes be made. Care should be exercised to insure maximum quantity of departmental standards.
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Comments - Does the employee prioritize his/her workload to accomplish the most important tasks first? Is the employee alert to changing conditions and/or departmental needs for flexibility? Does the employee comply with departmental and organizational policies and procedures? Is the employee consistently absent or tardy?
5. **Customer Service:** Measures the extent to which the employee exhibits the ability to be courteous, efficient, informed, available, tactful and diplomatic when representing the department and organization to internal and external customers.  
Comments - Does the employee treat internal and external customers in a professional manner? Does he/she look for positive solutions to solve internal and external customer problems? Does the employee often avoid contact with visitors to the office or on the telephone?
6. **Team Support:** Measures effectiveness in working with others and helping co-workers succeed; demonstrates the ability to be supportive and flexible, contributing to the overall success of the department and the organization.  
Comments - Does the employee approach challenges and problems in a positive manner and avoid negative influences among co-workers? Does he/she actively support the goals of the department and work to help the team succeed?
7. **Specific Job Criteria:** Measures those areas not included in the above categories that are specific to the performance of a particular job.  
Comments - Specifics may come from the job description, ADA form, or duties that are regularly carried out in the performance of job duties.

## **RATING GUIDELINES**

1. **Needs Development:** Reflects a fundamental or beginning level of performance and needs

continued development.

2. **Developing:** Reflects progress and is approaching job proficiency.
3. **Proficient:** Has achieved proficiency. Meets standard job requirements.
4. **Advanced:** Has detailed knowledge of job and exceeds standard job requirements.
5. **Outstanding:** Highest level of performance. Employee consistently demonstrates superior job performance in this position. Requires little supervision.

**APPENDIX "D"**  
**PROFESSIONAL DEVELOPMENT PLAN TABLE**  
(Optional for Employees without Supervisory Responsibilities)

The practice of setting goals and objectives is fundamental to professional growth. Objectives measure "where a person is going" over an established period of time. Goals should focus upon the vital and critical parts of professional development and continuous learning. Wherever possible, objectives should be specific and measurable; it is most helpful if they are written in exacting terms of quality and timeliness. Comments should be included where appropriate.

Name: \_\_\_\_\_

Timeframe: From \_\_\_\_\_ To \_\_\_\_\_

Goal	Specific Objective or Activity	Support Needed	Completion Date	Results Achieved and Comments

Comments: (ie: Additional accomplishments, certifications, training, etc.)

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

Include in personnel file? \_\_\_ Yes \_\_\_ No

**APPENDIX "E"**  
**SEASONAL/CASUAL PERFORMANCE EVALUATION FORM**

Employee's name	Position	Department	
Dates of Employment	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Casual	Other: _____

***Please tick off appropriate level of accomplishment and provide brief comments under each category.***

**Job Knowledge**

Extent to which employee possesses and applies knowledge, abilities and skills.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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**Quantity of Work**

Meets established work standards in both volume and timelines.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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**Quality of Work**

Meets pre-established standards. Thorough, accurate, neat. Makes sound decisions without delay. Able to assess alternatives. Uses analysis and evaluation skills in identifying problems.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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**Initiative**

Demonstrates drive, persistence, and enthusiasm for job being performed. Looks for solutions on own before asking for assistance. Demonstrates the ability to be a self-starter.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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**Oral and Written Communication**

Transmits ideas and information verbally with clarity, logic and conciseness. Has the ability to communicate effectively with supervisors, co-workers, and the public.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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**Planning and Organizing**

Establishes and follows work plans, controls assignments, and schedules. Sets priorities, meets deadlines, and makes effective use of time and resources.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

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Employee's Name: \_\_\_\_\_

**Ability to Work with Others**

Demonstrates flexibility in getting along with a variety of personality types. Enlists co-operation of others. Promotes understanding, establishes rapport. Demonstrates congeniality, courtesy, co-operation and tact in dealing with supervisors, co-workers, and public.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

\_\_\_\_\_

\_\_\_\_\_

**Work Habits**

Consistently punctual. Displays conscientious use of time and privileges. Carries out assigned tasks on time and to acceptable standards. Demonstrates flexibility, responsiveness, and quickness to grasp. Interprets and adjusts to change in the work to be performed or the manner in which it is performed.

N/A       Unsatisfactory       Developing       Satisfactory       Commendable

\_\_\_\_\_

\_\_\_\_\_

**Supervisor's Overall Comments:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Would you consider for rehire:      Yes       No

**Employee's Comments**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I have had the opportunity to review and discuss this evaluation with my supervisor. My signature does not mean that I agree with the evaluation.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Manager's Signature

\_\_\_\_\_  
Date

**For office use only:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Performance Evaluation – Seasonal/Casual Employees**  
***Supplement to Performance Evaluation for employees with supervisory responsibility***

\_\_\_\_\_  
Employee's name

\_\_\_\_\_  
Position

\_\_\_\_\_  
# of employees supervised

***Please tick off appropriate level of accomplishment and provide brief comments under each category.***

**Directing/Leading**

Ability to lead and guide others in the performance of their duties. Good communication skills.

Unsatisfactory

Developmental  Satisfactory

Commendable

**Training**

Ability to apply training methods for improvement in performance of duties.

Unsatisfactory

Developmental  Satisfactory

Commendable

**Planning/Organizing**

Ability to plan ahead, set priorities, establish work procedures and methods. Ability to organize work to make the most effective use of staff.

Unsatisfactory

Developmental  Satisfactory

Commendable

**Overall Rating of Supervisory Skills**

Unsatisfactory

Developmental  Satisfactory

Commendable

**Employee's Comments**

I have had the opportunity to review and discuss this evaluation with my supervisor.

\_\_\_\_\_  
Employee's Initials and Date

\_\_\_\_\_  
Supervisor's Initials and Date

\_\_\_\_\_  
Manager's Initials and Date

**For office use only:**

## **Performance Evaluation – Seasonal/Casual Employees Definitions of Rating Factor**

The following definitions serve as a guideline for interpretation of the factors. Not all statements need to apply.

### **Unsatisfactory**

- Employee has been in the position long enough to have shown better performance and should be informed that the training period is over.
- Employee can't do the job – would be better off in some other job for which they may qualify.
- No matter how many times things are explained, employee doesn't seem to grasp the work.
- The employee doesn't have the background to grasp the work.
- The work keeps falling behind. If the employee is retained on the job much longer, the department's workflow will be compromised.
- If retained, another employee will be required to get all the work accomplished.

### **Developing**

- Making good progress on the job.
- Has not been on the job long enough to have encountered all its aspects.
- Doing well for being fairly new on the job.
- More knowledge and experience are required before qualifying for the next level.
- More knowledge and experience are required before qualifying for the next level.
- Close supervision is required to plan assignments – after that the job usually gets done.

### **Satisfactory**

- Employee is doing a full, complete and satisfactory job.
- Employee is a good, solid member of the team and handles any kind of assignment within the scope of the position.
- Requires only normal supervision and follow-up. Almost always completes work or projects on schedule.
- Demonstrates a sound balance between quantity and quality. Prioritizes work assignments well.

### **Commendable**

- Employee exceeds position requirements even on some of the most difficult and complex parts of the job.
- Seizes the initiative in the development and in the implementation of challenging work goals.
- Displays the potential for career advancement.
- Employee anticipates problems, takes appropriate action, does own advance planning.
- Employee's actions show an understanding of more than the position held. Works towards the overall objectives of the department and the organization.
- Each project undertaken is done thoroughly and competently.
- Employee works with limited supervision and direction. Demonstrates a level of knowledge to make reliable decisions and actions.

Guidelines for interpretations of Rating Factors. Not all statements need apply.

### **Job Knowledge**

- Understanding the depth and breath of matters pertaining to the job.
- Knowledge of the regulations, policies, procedures and other factors affecting the job.
- Maintains an awareness of trends and development in his/her discipline.
- Knowledge of the techniques, procedures, processes, products, equipment and material to do the job.

### **Quantity of Work**

- Meets established work standards from the point of view of volume.
- Meets established work standards from the point of view of timelines.
- Applies self industriously.

### **Quality of Work**

- Quality of work meets pre-established standards
- Is thorough and accurate.
- Measures need for checking work and review.
- Requires minimum supervision.

### **Judgement**

- Make sound decisions without delay.
- Uses evidence at hand concerning specific problems to make decisions.
- Uses analysis and evaluation skills in problem identification.
- Able to assess alternatives.
- Makes sound decisions within a specific time frame.

### **Initiative**

- Demonstrates drive, persistence and enthusiasm for job being performed.
- Demonstrates the ability to be a self-starter.
- Looks for solutions on own before asking assistance.

### **Oral & Written Communication**

- Transmits ideas and information verbally with clarity, logic and conciseness.
- Transmits ideas and information in written format with clarity, logic and conciseness.
- Understands and accepts ideas in a one-on-one discussion.
- Understands and accepts ideas in a group.
- Ability to communicate effectively with Supervisor(s), Co-workers, Subordinates, and Public.

### **Planning & Organizing**

- Demonstrates effectiveness in work planning.
- Able to prioritize.
- Meets deadlines.
- Demonstrates ability to establish and follow work plans.
- Able to control assignments and schedules to get the job done.

- Makes effective use of resources.

### **Ability to Work with Others**

- Is flexible in getting along with a variety of personality types.
- Enlists co-operation of others.
- Promotes understanding.
- Establishes rapport.
- Utilizes channels of communications.
- Demonstrates congeniality, courtesy, co-operation and tact in dealing with Supervisor(s), Fellow Employee, Subordinates, and Public.
- Demonstrates ability to remain calm, poised and rational when faces with unexpected interruptions and abnormal situations.

### **Work Habits**

- Arrives for work and meetings on time, meets deadlines, keeps appointments.
- Uses time effectively through careful planning; allocates time wisely; avoids waste of time, keeps busy.
- Carries out assigned tasks without unnecessary supervision; consults with supervisors and colleagues as necessary.

**APPENDIX "F"**  
**PROBATION REPORT**  
(Instructions on Reverse)

EMPLOYEE		POSITION
DEPARTMENT	WORKSITE	DATE OF APPOINTMENT
DATE OF REVIEW		PERIOD COVERED
<p>WHEN MEETING WITH THE EMPLOYEE:</p> <ol style="list-style-type: none"> <li>1) State and discuss the primary responsibilities of this position.</li> <li>2) Set review dates to discuss progress, assigned tasks and/or identified areas requiring improvement.</li> <li>3) Gather supporting information from appropriate sources and contacts.</li> </ol>		
<p><b>Ratings: 1. Needs Improvement    2. Satisfactory    3. Very Good    4. Exceptional</b></p>		
<p>1.     <u>QUALITY AND QUANTITY</u> <span style="float: right;"><u>RATING</u></span></p> <p>Ability to Meet Deadlines  Ability to Accomplish Assigned Tasks  Supervision Required</p> <p>COMMENTS:</p>		
<p>2.     <u>RELATIONSHIP AND COOPERATION</u> <span style="float: right;"><u>RATING</u></span></p> <p>With Clients  With Peers  With Supervisors</p> <p>COMMENTS:</p>		
<p>3.     <u>WORK HABITS</u> <span style="float: right;"><u>RATING</u></span></p> <p>Regularity of Attendance  Punctuality  Use of Equipment and Supplies</p> <p>COMMENTS:</p>		
<p>4.     <u>COMMUNICATION SKILLS</u> <span style="float: right;"><u>RATING</u></span></p> <p>COMMENTS</p>		
<p>5.     <u>ADAPTABILITY</u> <span style="float: right;"><u>RATING</u></span></p> <p>Ease in Learning New Methods  Ease in Following Directions  Ability to Work Under Pressure  Problem-Solving Ability</p> <p>COMMENTS:</p>		
Date	Supervisor's Signature	

C) Identify training/learning opportunities to assist the employee in completing assigned tasks and addressing areas requiring improvement.

**EMPLOYEE'S COMMENTS**

Date

Signature

**REVIEWER'S COMMENTS AND RECOMMENDATION**

Date

Signature

**DEPARTMENT HEAD RECOMMENDATION**

(Note: to be completed at the end of the probationary period or when rejecting an unsuccessful candidate)

Grant Permanent Status     YES     NO

Date

Signature

**INSTRUCTIONS**

**GENERAL**

The probationary period is an integral part of the selection process, and should be used to determine whether the employee is to continue in their probationary period, be granted permanent status, or have employment terminated.

**REFERENCE**

Sections 5.1 and 5.2 of the *Employee Assessment and Development Plan* Policy and related Collective Agreements.

**INSTRUCTIONS**

1. At regular intervals, a supervisor shall assess the performance of the probationary employee.
2. A completed copy of the report is to be forwarded to the HR Department.
3. Although most employees successfully progress through their probationary period, there are instances

where employees are not suitable. When a likely rejection becomes apparent, advice should be sought from the Human Resources Department.

4. Rejection may occur at any time during the probationary period, but should normally occur only as the final step in a series of assessments of the employee's performance.