

# Annual Performance Summary Management Group



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

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

School / Department: \_\_\_\_\_

Period Covered: From \_\_\_\_\_ To \_\_\_\_\_

Annual Evaluation  Other:   
(Please Explain) \_\_\_\_\_

## **Policy Reference: Section 6.0 of the Management Terms and Conditions**

1. Performance expectations should be set and clarified through collaboration and discussion at the beginning of the review period. An Individual Learning Plan is also completed at this time.
2. Throughout the review period, regular performance feedback and coaching is provided by the supervising manager to assist the employee in achieving their goals, or to adjust the goals. Any changes to the original performance plan should be noted.
3. Performance will be assessed at the end of the review period based on eight dimensions of performance. Ratings will be supported by narrative documentation of results achieved and specific behaviour observed throughout the review period. ***It is not acceptable to rate performance without providing a narrative summary of behaviour supportive of the rating.***
4. An overall rating of employee performance as: **Exceeding Performance Plan, Fully Achieving Performance Plan, Marginally Achieving Performance Plan** or **Unsatisfactory** is then determined.
5. Where the employee is eligible for a salary adjustment the appropriate documentation should be completed, discussed with and signed by the Senior Manager, ***prior to discussion with the employee.***
6. The signed documentation must be received by the Manager of Compensation and Benefits by either April 15<sup>th</sup> or October 15<sup>th</sup>. The documentation will then become part of the employee's permanent record.

**Performance Plan:**

*(Attach supplementary documentation if more space is required).*

Describe the <b>Performance Expectations</b> for the period from: _____ to _____		Describe the <b>Outcomes Achieved</b> for the period from: _____ to _____	

**Individual Learning Plan:**

*(Specific initiatives targeted to current and future personal and professional growth).*

<b>Current Effectiveness</b>	<b>Career Development</b>
I need to focus on the following competencies in support of my current position:	I want to develop the following competencies in support of my long term career interests:

<b>Learning Activity</b>	<b>Target Date</b>

**Signature Block:**

*(Acknowledges concurrence with both the Performance Plan and the Individual Learning Plan)*

\_\_\_\_\_

Employee

\_\_\_\_\_

Date

\_\_\_\_\_

Manager

\_\_\_\_\_

Date

**Performance Dimension Ratings:** (Circle the appropriate rating and supply supporting comments)

<b>Outcomes Achieved:</b> Measures the incumbent's work in relation to agreed upon strategic and operational plans, objectives, special projects, budgets, and the normal scope of the position as described on page 2.	<b>Rating</b>
The incumbent achieved results that were significantly above the agreed upon operational plans, objectives, and the normal scope of the position. Where applicable, budget goals were exceeded.	Exceeds
The incumbent achieved results that met the agreed upon operational plans, objectives, and the normal scope of the position. Where applicable, budget goals were met.	Meets +
	Meets
	Meets -
The incumbent achieved results that were well below the agreed upon operational plans, objectives, and the normal scope of the position.	Misses
<u>Comments:</u>	

<b>Academic/Professional Leadership:</b> Measures the incumbent's level of expertise in her/his professional field and the application of this expertise in support the Institute's academic vision.	<b>Rating</b>
The incumbent was recognized as a leader in his/her discipline or profession. This expertise was applied in a manner that significantly enhanced the workings of his/her school or department.	Exceeds
The incumbent remained current in his/her discipline or profession. This expertise was applied in a manner that enhanced the workings of his/her school or department.	Meets +
	Meets
	Meets -
The incumbent fell behind in his/her discipline or profession; taking limited or no advantage of training and development opportunities that would improve his/her standing position.	Misses
<u>Comments:</u>	

<b>Customer Focus:</b> Measures the degree to which the incumbent's work performance aligns with the needs of internal and/or external customers.	<b>Rating</b>
The incumbent consistently developed strategic partnership relationships with his/her external and/or internal customers. Customers' needs and expectations were consistently anticipated and exceeded.	Exceeds
The incumbent consistently consulted with his/her internal and/or external customers. Customers' needs and expectations were consistently met.	Meets +
	Meets
	Meets -
The incumbent demonstrated limited success in meeting the needs and expectations of customers, rarely even seeking to understand them.	Misses
<u>Comments:</u>	

**Performance Dimension Ratings: (continued)**

<b>Leading Others:</b> Measures the degree to which the incumbent provides vision, coaching and mentoring to subordinates, peers and others.	<b>Rating</b>
The incumbent provided others with both a strategic vision and the support to achieve that vision. A significantly increased level of performance resulted from these leadership efforts.	Exceeds
The incumbent provided others with both a clear vision and the support to achieve that vision. An increased level of performance resulted from these leadership efforts.	Meets +
	Meets
	Meets -
The incumbent rarely provided direction and coaching to subordinates and/or peers. It was conducted in a manner that did little to enhance performance.	Misses
<u>Comments:</u>	

<b>Managing Results:</b> Measures the scope and effectiveness of the incumbent's planning, organizing, problem solving and decision making.	<b>Rating</b>
The incumbent consistently used the Institute's strategic framework to plan, organize and solve problems thus supporting both short and long term results. He/she ensured that decisions made were in the best interest of the long term health of the Institute.	Exceeds
The incumbent demonstrated acceptable planning, organizational, and decision making skills with a focus on a 'day-to-day' context. He/she ensured that decisions made were in the best interest of the immediate needs of the Institute.	Meets +
	Meets
	Meets -
The incumbent demonstrated unacceptable planning, organizational, and decision making skills.	Misses
<u>Comments:</u>	

<b>Business Processes:</b> Measures how operational processes are designed, managed, and improved in relation to current industry or academic standards, and overall effectiveness.	<b>Rating</b>
The incumbent took actions that ensured that processes being used were of optimum strategic effectiveness. Initiatives made a significant contribution to the success of the operation.	Exceeds
The incumbent took actions that ensured that processes being used were effective. Process improvement initiatives contributed to the success of the operation.	Meets +
	Meets
	Meets -
The incumbent the incumbent paid little attention to process improvement even in those areas that clearly were problematic.	Misses
<u>Comments:</u>	

**Performance Dimension Ratings: (continued)**

<b>Teamwork:</b> Measures the degree to which the incumbent utilizes and encourages teamwork in both formal and ad hoc situations.	<b>Rating</b>
The incumbent championed the appropriate use of teamwork both within and outside his/her work group. Through his/her efforts (as a member or a leader), the teams that he/she worked with produced results that significantly exceeded expectations.	Exceeds
The incumbent encouraged the appropriate use of teamwork within his/her work group. His/her role (as a member or a leader) with these teams contributed to productive outcomes.	Meets +
	Meets
	Meets -
The incumbent was neither supportive of teamwork nor rarely functioned in a team environment in any capacity.	Misses
<u>Comments:</u>	

<b>Independence:</b> Measures the degree to which the incumbent is able to function in an autonomous environment.	<b>Rating</b>
The incumbent was totally self sufficient in all aspects of their job. He/she was aware of those circumstances where he/she needed to seek guidance, and provided updates in a timely, proactive manner.	Exceeds
The incumbent required an average amount of support and direction from his/her manager. He/she was aware of those circumstances where he/she needed to seek guidance.	Meets +
	Meets
	Meets -
The incumbent required significant and disproportionate coaching from his/her manager. He/she failed to recognize situations where he/she needed to seek support and guidance.	Misses
<u>Comments:</u>	



**Overall Performance Assessment: (continued)**

The appraiser must discuss this evaluation with the employee, providing rationale for the decision and allow for employee input.

**Employee's Comments:**

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Employee

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Date