

## BCIT Management/Excluded Performance Summary Form

This form is to be completed by the employee and the employee's manager. Please open this form using Acrobat.

### 1. Employee Information

Employee Name		Goal-Setting Date (Complete May-June)	
Department		Formal Check-in Date (Complete by Nov 30)	
Role Title		Year-End Review Date (Complete by May 31)	
Manager Name		6-Month Probationary Review (for probationary employees only – complete formal check-in section)	

### 2. Performance Goals (What is to be accomplished?)

- In priority order list one organizational/departmental goal; two performance goals; and one stretch performance goal;
- Each goal should be SMART: Specific, Measurable, Attainable with stretch effort, Relevant, and Time-bound; and
- Goals are cascading: the organizational/departmental goal will be directly linked to BCIT's strategic plan; areas' visions or plans, or your department's plan.

**Formal Check-ins:** Check in on employee's progress of goals.

**Year-end Review:** Provide comments on accomplishments and performance.

**Goal #1 - Organizational / Departmental Goal (A common shared goal, cascaded from your manager, department, school, area, and/or from strategic planning documents)**

**Define the goal:**

**Define how achievement will be measured (even if it is subjective assessment):**

<b>Goal #1 - Organizational / Departmental Goal (A common shared goal, cascaded from your manager, department, school, area, and/or from strategic planning documents)</b>	
<b>Formal Check-in</b>	
<b>Goal Status:</b>	
<b>Employee comments: (Formal Check-in)</b>	<b>Manager comments: (Formal Check-in)</b>
<b>Year-end Review</b>	
<b>Goal Status:</b>	
<b>Employee comments:</b>	<b>Manager comments:</b>

**Goal #2 – Performance Goal (Goals that relate to your job's key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio)**

**Define the goal:**

**Define how achievement will be measured (even if it is subjective assessment):**

**(Formal Check-in)**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Goal #2 – Performance Goal (Goals that relate to your job’s key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio)**

**Year-end Review**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Goal #3 - Performance Goal (Goals that relate to your job’s key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio)**

**Define the goal:**

**Define how achievement will be measured (even if it is subjective assessment):**

**Goal #3 - Performance Goal (Goals that relate to your job's key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio)**

**(Formal Check-in)**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Year-end Review**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Goal #4 - Performance Stretch Goal (An aspirational goal that relate to your job's key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio and are not professional development based)**

**Define the goal:**

**Define how achievement will be measured (even if it is subjective assessment):**

**(Formal Check-in)**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Goal #4 - Performance Stretch Goal (An aspirational goal that relate to your job's key areas of responsibility – your big buckets; they are role specific and level specific; may vary based on your individual portfolio and are not professional development based)**

**Year-end Review**

**Goal Status:**

**Employee comments:**

**Manager comments:**

**Other Accomplishments**

**List other accomplishments achieved in response to significant challenges and opportunities, outside of the formal goals, that should be recognized.**

### 3. Competencies – Strengths and Growth Opportunities

BCIT's leadership competencies describe the positive behaviours and culture we want to foster.

<b>Inspires Shared Vision</b>	<b>Fosters Collaboration</b>
<b>Delivers Quality and Excellence</b>	<b>Champions Change and Innovation</b>
<b>Builds Talent</b>	<b>Mobilizes People</b>

Review the competencies' behaviours applicable to your position and leader level to describe how you have demonstrated a few competencies during each review period (Which ones were strengths that supported your goal progress and accomplishments?). Choose one or two competencies during each review period that you want to develop (Which one/s, if practiced more or developed further, would support success?).

If you have described demonstration of the competencies in the goals section above, please also indicate which specific competencies have been demonstrated.

**Formal Check-in:** Check in on the level of competencies demonstrated to date.

**Year-end Review:** Provide comments on the demonstrated level of competencies. A well-rounded reviewee is one who demonstrates a general level of proficiency across all competencies.

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**Describe 2-3 competencies you demonstrated that supported your goal progress and accomplishments during this review period**

<b>Employee comments: (Formal Check-in)</b>	<b>Manager comments: (Formal Check-in)</b>
<b>Employee comments: (Year-end Review)</b>	<b>Manager comments: (Year-end Review)</b>



Describe 1-2 competencies that you would like to develop. You may optionally use the Excluded Professional Development Goals Form, to formalize the actions you will take to enhance this competency

Employee comments: (Formal Check-in)

Manager comments: (Formal Check-in)

Employee comments: (Year-end Review)

Manager comments: (Year-end Review)

#### 4. Overall Performance Comments and Rating Recommendation

Overall Year-End Manager Comments

Overall Performance Rating - Manager to complete after year-end review meeting. Ratings will be shared after Calibration. Goals ("what") and competencies ("how") should be equally weighted to arrive at the final rating.

Goal Rating (50%):  Competency Rating (50%):  Overall Performance Rating:

\*Overall rating must align with BOTH goal and competency commentary in manager assessment and further validated during calibration  
Manager to complete after year-end review meeting. Ratings will be shared with employee after calibration.

#### 5. Signatures

Employee signature acknowledges receipt of completed evaluation and meaningful discussions to provide context for evaluation; it does not necessarily indicate agreement.

Employee:  Date:

Appraiser:  Date:

Appraiser's Leader:  Date:

Overall Year-End Performance (Employee to complete after final review and rating has been shared.)

Employee comments:

## PERFORMANCE RATING GUIDE

This performance rating guide should be used in conjunction with BCIT's [Competency Model Guide](#). The behaviour descriptions for the shared competencies vary by leader level. Managers and employees should refer to the competency behavioral descriptions that apply to each leader level. Below are summary descriptions of each rating level and how they are to be applied when evaluating performance.

	Goals	Competencies	Application Guidance
Limited Contributor - 1	<p>Performance <u>did not meet</u> established goals and/or Employee needs to improve performance significantly in one or more key areas of their job.</p> <p>Requires more ongoing supervision and support than should be necessary for the job.</p>	<p>Generally across competencies, Employee consistently demonstrates a <u>lower than acceptable proficiency level</u> of competency behaviours, e.g., not demonstrating competencies at all or demonstrating a lower proficiency level than is appropriate.</p> <p>Employee demonstrates a limited ability to apply their skillset, and needs significant improvement to achieve results.</p>	<p>Performance is significantly and consistently below expectations in most areas of accountability, and reasonable progress toward goals was not made.</p> <p>Employee demonstrates lack of knowledge, skills, abilities and/or attitude to achieve identified goals and required competencies.</p> <p>This may mean immediate action must be taken to substantially improve performance within a reasonable period of time. Employee should be placed on a performance development plan with specific and clear actions to improve areas of low performance.</p> <p>This rating should not be a surprise to an Employee, as regular performance discussions should be taking place before this point of final assessment.</p>
Emerging Contributor - 2	<p>Performance <u>meets some but not all</u> established goals or goals represent the initial aspects of the role due to time in role;</p> <p>Performance shows Employee is learning the essential functions and has not been exposed to all the complexities of the role. Job performance partially meets some established goals or goals represent the initial aspects of the role due to time in role;</p> <p><b>OR</b></p> <p>Employee's performance against goals may require improvement to achieve consistent performance. Job performance in one or more areas needs to be supported to be successful in the role.</p>	<p>Generally across competencies, Employee is working toward gaining the necessary <u>proficiency level</u> of competency behaviours.</p> <p>Employee is developing in one or more competencies to meet proficiency level required in the role.</p>	<p><b>Emerging Employee and/or Developing Employee</b></p> <p><b><u>Emerging Employee:</u></b></p> <p>This rating <b>may</b> apply to an employee who is new to BCIT or moved to a new role in the middle of the performance year.</p> <p>Employee is learning essential function of role and is developing required competencies based on their time in the job. Employee may be meeting or partially completing the identified goals and competencies.</p> <p>This rating is not meant to apply to all new employees, as some new employees may be fully proficient, usually requiring at least six months.</p> <p><b><u>Developing Employee:</u></b></p> <p>Does not <u>consistently</u> meet expectations, or performance is not yet meeting expectations in one or more <u>essential</u> areas of responsibility, and/or one or more of the most critical goals is not yet being met.</p> <p>Employee may be developing in their role, but performance is not quite at the expected level.</p> <p>The Manager may need to work on a development plan with the Employee to assist them in bringing their performance up to meeting expectations.</p>

	Goals	Competencies	Application Guidance
Effective Contributor – 3	<p>Performance <u>fully meets all established</u> goals; Employee is a solid contributor to the success of department and organization.</p> <p>Employee is capable of operating independently with minimal guidance from their supervisor.</p>	<p>Generally across competencies, Employee consistently demonstrates the <u>expected proficiency level</u> of competency behaviours.</p> <p>Employee is consistently meeting the proficiency level of their role.</p>	<p>Fully achieves specified criteria and demonstrates effective performance in all areas of accountability, and at times, exceeding expectations.</p> <p>Overall, quality of work is very good and meets the Institute's high-performance standards.</p> <p>Performance is reflective of a fully qualified and experienced individual in this role; Employee requires minimal supervision.</p> <p>Successfully meets the demands placed upon the position, and consistently contributes positively to overall objectives of department and/or organization.</p>
Strong Contributor – 4	<p>Performance <u>fully meets all established goals and exceeds in the quality, completion and delivery of some goals</u>. Employee is a valued contributor to success of department and organization</p> <p>Employee is a strong and solid contributor and should be supported in career development opportunities</p>	<p>Generally across competencies, Employee consistently demonstrates a <u>higher proficiency level</u> of competency behaviours.</p> <p>For some competencies, Employee exceeds expected proficiency level.</p> <p>Employee has a strong skillset and is performing at a higher level than expected for their role.</p>	<p>Consistently performs above and beyond the expectations of the areas of accountability. Contributes and delivers significant results on own initiative and adds value to the organization beyond what is expected.</p> <p>Demonstrates enhanced self-management practices and produces excellent quality of work on a consistent basis. Demonstrates high levels of effort, effectiveness and judgment with limited or no supervision.</p> <p>Achievements and abilities are seen by direct reports, peers, leaders and clients.</p> <p>Has high visibility in their internal and external groups, and is deemed as the “go-to” person for their area of specialty. One of the key contributors within the Institute and peer group.</p> <p>In general, there is a small number of such employees in a department.</p>
Exceptional Contributor – 5	<p>Performance consistently <u>exceeds ALL established goals</u>; Employee has made significant contribution(s) to department and organization.</p> <p>Employee is an exceptional contributor and should be considered for career progression, e.g. promotion, or role expansion opportunities.</p>	<p>Generally across competencies, Employee consistently demonstrates a <u>higher proficiency level</u> of competency behaviours than expected of their role.</p> <p>Employee is recognized as a role model for others in the organization.</p>	<p>Employee is a top performer who steps outside of existing responsibilities to make significant and measurable contributions to the organization's strategic goals.</p> <p>Focuses on big picture and is seen as a “game-changer” in the organization, often is not content working with status quo, and is constantly looking for ways to make a broad impact.</p> <p>Creates positive impact in the organization that is felt across multiple levels of partners.</p> <p>Easily recognized as top performer compared to peers. Acts as a mentor to others and openly shares information and resources with others across the Institute. Models the values of the Institute on a daily basis.</p> <p>May involve the accomplishment of a significant initiative, and/or a far-reaching and unique contribution to the department/Institute.</p> <p>An Exceptional Contributor rating is achievable, but should not be expected year over year, as it is reserved for performance that is truly extraordinary across all standards, expectations and objectives. In general, there is a small number of such employees in the organization.</p>