

PURPOSE

A meaningful and effective performance assessment system promotes and enhances an on-going, collaborative process between supervisors and employees in order to:

- a) mutually establish performance expectations and goals;
- b) provide feedback on accomplishments and areas in need of improvement;
- c) develop a plan for maintaining job performance at a satisfactory level or for improving performance.

The formal, written performance assessment for each assessment period summarizes the employee's job performance for that period. The assessment process is an opportunity to recognize positive performance and reinforce job expectations. Areas for improvement or challenges noted are meant to reinforce prior discussions and support/coaching.

INSTRUCTIONS

1. The time period for performance assessment shall encompass no more than a year prior to the date the evaluation form is completed.
2. The following characteristics/skills set should be kept in mind when completing performance assessment forms –the self assessment, the 360 assessment (if used) and the supervisors' assessment of:
 - Written Communications
 - Oral Communication
 - Job Knowledge
 - Organization and Planning
 - Leadership
 - Supervision – if supervision is checked on the employee's Position Description Questionnaire (PDQ)
 - Dependability
 - Initiative
 - Problem Solving Ability
 - Flexibility/Adaptability
 - Professionalism

Questions pertaining to these characteristics are included after the instruction section.

3. The supervisor forwards to the employee a "Salaried Employee Self Assessment " and an uncompleted "Salaried Employee Performance Assessment" form. The employee should complete the self assessment using the job description and characteristics listed above as a guideline and return it within two weeks. The Performance Assessment form is provided as a guide for discussion. The supervisor will also forward a copy of the current job description to the employee. **NOTE: This would be an appropriate time for the employee to review their PDQ to ensure that it reflects the current functions and percentages of time in each function.**
4. Once the self assessment has been returned or if it is not returned, within the two week period, the supervisor should schedule an interview with the employee.
5. If either the supervisor and / or employee choose to have others participate in the assessment process, both should be given a chance to invite participation from people of their choice. The

employee must be given prior notice of participants who will be included in the performance assessment process. A description of the 360 degree process, sample letter and form are attached that may be used to facilitate this process. Any performance assessment forms provided from these evaluators will not be included in the permanent personnel file, nor will the unit member have access to them – they will be used only to assist the supervisor in completing the performance assessment form.

6. Prior to the interview the supervisor should first review the self assessment and 360 feedback (if used) and then complete the assessment sections.
 - Using the job description and characteristics listed in #1 above, identify the employee's strengths. Please provide examples to support your observations.
 - Using the job description and characteristics listed in #1 above, identify the employee's challenges and areas in need of improvement. Please provide examples to support your observations.
7. During the interview the supervisor and employee should discuss the completed assessment forms. The job description should be reviewed with the employee. The supervisor should point out areas of satisfactory or outstanding performance as well as areas to be improved making specific suggestions for improvement.
8. The supervisor and employee should establish goals and objectives for the employee, which will be used in the next assessment .
9. After the performance assessment document has been completed both the supervisor and employee must sign the assessment form. If a copy of the assessment is not signed by the employee and returned within seven (7) calendar days, an unsigned copy shall be placed in the personnel file. The supervisor gives a copy to the employee, sends another copy through to the appropriate administrator and then to the custodian of salaried employee personnel files. No alterations or comments may be made on the form after the employee and supervisor have signed it.
10. Confidentiality of the information is the shared responsibility of the supervisor, any reviewing administrator(s) and the file custodian. Ordinarily, the performance assessment document will be available only to the employee involved, his or her supervisor, appropriate administrators, and/or a duly designated representative in accordance with the collective bargaining agreement.
11. The employee will not have access to the actual input provided by employees or other individuals. In the event that an employee receives a rating of unsatisfactory and input was given by someone other than the supervisor, the employee may request and will receive a summary of comments from those who provided input, but the comments will not be attributed to the contributor. The employee, upon receiving an unsatisfactory rating when input has been sought and received, will have the right to ask another individual to provide input on their behalf.