

Policy & Procedure Manual

PERFORMANCE MANAGEMENT SYSTEM - HR-IV-1

POLICY:

OPTIONS NORTHWEST takes pride in realizing its vision and ensuring the mission and philosophy are carried out by each employee to the greatest extent possible. As such, each employee of OPTIONS NORTHWEST shall be held accountable for his/her work performance in relation to our vision, mission, and philosophy and his/her job description which outlines key job responsibilities and expected standards for the position held within the agency.

Throughout the employee's probationary period, the Supervisor/Manager/Director will review the employee's orientation, performance and attendance in order to make and communicate a decision to the employee regarding permanent employment status. Prior to the expiration of the employee's probationary period, the employee and the Supervisor/Manager/Director will meet to discuss and formalize a probationary performance review.

The performance management process shall take into account, the accessibility needs of employees with disabilities, including existing accommodation plans and in providing career development and advancement to employees, as may be discussed and documented in a performance review.

Each permanent employee will have documented annual Performance Reviews with his/her Supervisor/Manager/Director. Each contract employee will have a documented Performance Review prior to the expiration of his contract.

All reviews shall be completed and signed in ink, and forwarded to Human Resources for recording and filing in the personnel files.

PURPOSE:

1. To provide a written record of feedback/guidance for work performed.
2. To ensure work expectations and relevant legislation is understood and complied with in the workplace.

3. To identify and recognize strengths and internal opportunity for change/advancement.
4. To identify areas for development/improvement and/or training.

PROCEDURE:

A. PERFORMANCE REVIEWS FOR PROBATIONARY EMPLOYEES:

1. Upon hire, Human Resources will ensure a Probationary Performance Review (see Appendix A) is forwarded to the new employee's Supervisor/Manager/Director.
2. Upon orientation, the Supervisor/Manager/Director of the new employee will: meet with the employee and review his/her key job responsibilities and expected standards outlined in their job description, and establish a date to review and formalize the probationary Performance Review. The Supervisor/Manager/Director shall ensure that the probationary performance review is completed in accordance with established probationary periods and takes into account accessibility needs of employees with disabilities, including existing accommodation plans and when providing career development and advancement to employees as may be discussed and documented during a performance review.

NOTE: Supervisors/Managers/Directors wanting to extend probationary periods must discuss with his/her Director and the Director of Human Resources before a decision is made regarding an extension. Any extensions will be made in accordance with any applicable collective agreement language.

3. Following completion of the review, the employee and Supervisor/Manager/Director shall sign off and date the review in ink on the last page and the Supervisor/Manager/Director will forward the document to Human Resources for review and sign off by the Human Resources Director.

The review date will then be entered into the Human Resources Information System and the review will be filed in the employee's personnel file.

B. PERFORMANCE REVIEWS FOR PERMANENT EMPLOYEES:

1. In January of every year, Human Resources personnel will forward a memo to all Supervisors/Directors reminding them to conduct an annual Employee Performance Review (see Appendix B), for each of their employees. The Supervisor/Director may provide the employee with a blank performance review form (HR440) in advance in order for the employee to prepare for their annual review.

2. On an ongoing basis, the Supervisor/Manager/Director shall provide constructive feedback to employees in a timely manner.
3. As may be required, the employee shall request clarification from his Supervisor/Manager/Director in a timely manner, on matters of work performance he is unclear about.
4. The Supervisor/Manager/Director will meet with each permanent employee on an annual basis to discuss and document a Performance Review. The agency vision, mission, and philosophy, employee's job description and applicable legislation as well as any applicable work/shift plans and goals may be used as a guide to review employee work performance and conduct. The Supervisor/Manager/Director shall complete each applicable expectation by checking off "Meets" or "Requires completion or improvement". The "Comments" column may be used to add additional information. Where the "Requires completion or improvement" column has been checked off, comments must be noted. The employee, in concert with his/her Supervisor/Manager/Director shall complete "career goal" and objectives to meet their goal for the year and discuss with their Supervisor/Manager/Director. The Supervisor/Manager/Director shall ensure that the review is completed annually and takes into account accessibility needs of employees with disabilities, including existing accommodation plans and when providing career development and advancement to employees as may be discussed and documented during a performance review.
4. Both employee and Supervisor/Director can complete general comments regarding work performance on the last page and both shall sign and date the review on the last page in ink
5. Following completion of the Review, the Supervisor/Manager/Director will forward the original document to Human Resources who will enter the review date into the Human Resources Information System and file the review in the employee's personnel file.

C. PERFORMANCE REVIEWS FOR CONTRACT EMPLOYEES:

1. Upon hire Human Resources personnel will ensure a Probationary Performance Review is forwarded to the Supervisor/Manager/Director.
2. Upon orientation, the Supervisor/Manager/Director will meet with the employee to review his/her key job responsibilities and expected standards and establish a date to review and formalize a performance review prior to the expiration of the contract.
3. The Supervisor/Manager/Director shall ensure that the review is completed in accordance with established probationary periods and takes into account accessibility needs of employees with disabilities, including existing accommodation

plans and when providing career development and advancement to employees as may be discussed and documented during a performance review.

4. Throughout the term of employment, the Supervisor/Manager/Director shall provide to the employee, constructive feedback for work performed in a timely manner.
5. As may be required, the employee shall request clarification from his Supervisor/Director in a timely manner, on matters of work performance he is unclear about.

NOTE: If the contract employee works beyond one year, the Review must be completed prior to the year end, and again at the completion of the contract.

6. Following completion of the Review the Employee and Supervisor/Manager/Director shall sign off and date the review in ink and the Supervisor/Manager/Director will forward the original document to Human Resources for sign off by the Human Resources Director. The review date will be entered into the Human Resources Information System and the review will be filed in the employee's personnel file.

RECOMMENDED BY: Director, Human Resources

APPENDICES: 2

OPERATIONAL ACCOUNTABILITY: Administration, Finance, Human Resources, Community Services (all)

ORIGINAL POLICY DATE: April 1993

AUTHORIZED BY: Executive Director

SIGNATURE: _____

**OPTIONS NORTHWEST
PROBATIONARY PERFORMANCE REVIEW**

DATE OF ISSUE: EMPLOYEE: STATUS:	DATE OF HIRE: PRIMARY AREA OF ASSIGNMENT: SUPERVISOR:	EXPECTED STANDARDS	EVALUATION OF PERFORMANCE
KEY JOB RESPONSIBILITIES			

PROBATIONARY PERFORMANCE REVIEW

CRITERIA	REVIEW
<p>ATTENDANCE</p> <p>Absences reviewed</p> <p>Reporting policies followed</p>	
<p>TRAINING NEEDS</p> <p>Identify training taken and required for the coming year.</p>	
<p>PERFORMANCE GOALS</p> <p>Set work performance goals to be achieved over the year.</p> <p>Determine Strategy and timeframe.</p> <p>Set any required review dates</p>	

PROBATIONARY PERFORMANCE REVIEW

GENERAL COMMENTS:

EMPLOYEE'S COMMENTS:

EMPLOYMENT STATUS:

Permanent

Extend

Note: Length of Extension
and Meeting

Unsuccessful
Note: Reason(s):

EMPLOYEE'S SIGNATURE

DATE

SUPERVISOR'S SIGNATURE

DATE

HUMAN RESOURCES DIRECTOR

DATE

**- OPTIONS NORTHWEST -
Employee Annual Performance Review Report**

Employee: _____ Supervisor: _____

Position: _____ Review Date: _____

Employee Performance is to be documented in relation to Position Expectations for achieving and/or supporting the following:

Expectation	Meets √	Requires completion or improvement (must have a plan for completion/improvement noted in comments section)	Comments
Annual Review of Vision, Mission, & Philosophy			
Demonstrates support of Vision, Mission & Philosophy			
Annual RRPA training			
Remains current with Agency/DS sector communication (bulletins, meeting minutes)			
Possesses knowledge/skills to accomplish duties			
Meets job expectations (refer to job description)			
Is able to problem solve appropriately			
Is organized/meets deadlines			
Interpersonal skills are appropriate (tone, words/phrases, body language)			
Communication skills are appropriate (verbal, written, body language)			
Accepts direction/feedback			
Is accurate/thorough & impact of errors is minimal			
Demonstrates initiative/creativity			

MISSION, VISION, & PHILOSOPHY

DUTIES OF POSITION

Expectation	Meets ✓	Requires completion or improvement (must have a plan for completion/improvement noted in comments section)	Comments
DUTIES OF POSITION SPECIFIC TO DIRECT SUPPORT PROFESSIONALS Ability to apply behaviour intervention techniques and to support individual according to their positive BSP where challenging behaviour exists Rules governing physical restraints reviewed and understood Demonstrates commitment to promoting choice and decision making, independence, and exercising control over their environment Educates and ensures informed choice making in all aspects of living Supports and facilitates the development of meaningful relationships and community inclusion Supports the individual during the planning process, developing short and long term goals, strategies, and steps to reach goals Is cooperative and tactful Is respectful and professional Is positive Is flexible and open minded Is conscientious Is consistent Is mindful at work Is punctual Is reliable, present for work as scheduled			

Expectation	Meets √	Requires completion or improvement (must have a plan for completion/improvement noted in comments section)	Comments
POLICIES & TRAINING			
Demonstrates understanding of and follows agency policies & procedures			
Policy & Procedure reading is current			
Annual Mandatory Training completed			
Additional identified Training completed			
Is conscientious about following safe work practices			
Contributes to safety at work			
Understands responsibilities under the OSHA Per Specific Sections of Accountability: Worker Section 21 (1) (2) (3) Supervisor Section 27 (1) (2) Employer Section 25 (1) (2) (3) (4) Section 26 (1) (2) (3)			

Career Goal: _____

Objectives for the coming year (supports career goal, is measurable and timed):

Employee Comments:

Supervisor Comments:

Employee Signature: _____

Date: _____

Supervisor/Director Signature: _____

Date: _____

Please forward to Human Resources upon completion.

Date received in HR: _____

Date entered into OHR: _____