

Performance Review

Reviewed Date		Number	HR0105
Revised Date	August 9, 2023	Approved Date	December 19, 1990

Introduction

As organizations change and grow, their success depends on their ability to support and encourage the continuous learning of their employees in line with agency needs and directions. An effective performance review system is continuous and dynamic. It provides a means for coaching and counselling in order to train and develop employees to both fulfill the duties and responsibilities of their job and to meet their personal and professional goals.

Purpose

To inform health unit board of health members, employees and students of the parameters in which performance reviews are conducted.

Legislative Authority

N/A

Policy Definitions and Interpretation

Reviewer: The individual to whom the employee directly reports. This may be a Supervisor, Manager, Vice President and/or MOH.

Position: An employee's assigned job title and responsibilities within a specific program/team regardless of their hired FTE.

PER: Departmental or Agency Performance Evaluation Report

Policy

All individuals employed by the agency will receive relevant, timely feedback on their probation and non probationary performance as it relates to their job duties and responsibilities. Human Resources is responsible for setting up of the performance review schedule for each employee while the employee's immediate supervisor is responsible for completion of all probation and non probation forms. Vice Presidents/Managers/Supervisors are responsible for providing performance feedback to staff on a day-to-day basis and for scheduling formal opportunities to review performance and set out performance goals. Vice Presidents will review and initial all completed performance reviews for their department. Vice Presidents are responsible to ensure both probation and non probation performance reviews are completed in their departments.

While individuals and departments may have their own unique ways of evaluating employee performance, all approaches must:

1. Recognize that for feedback on behaviour to be effective, it must be given at the time the behaviour is observed;

2. Provide ongoing feedback within an environment that fosters a problem-solving approach to a wide variety of issues;
3. Reflect the organization's beliefs, values, mission, goals and objectives;
4. Provide for the active involvement of employees in the appraisal process including self-evaluation and goal setting;
5. Be based on clear position descriptions, performance goals and performance standards; and
6. Include formal meetings with employees to document discussions of performance and to identify performance goals and expectations. At a minimum, these formal reviews must be:
 - a) Timely:

The agency defines timely as follows:

Probation

- When the employee has been in a new position for one month/151 paid hours, a meeting will be scheduled between the reviewer and the employee to review job roles, responsibilities, and progress and performance expectations. Probationary Employment Assessment Report Phase I (HR0105 F2) will be completed reviewed with the employee and forwarded to HR. If the employee is not meeting performance expectations, either a weekly or biweekly review may be required to assist the employee in the new position or their employment relationship will be ended at this time.
- When the employee has been in a new position for three months/455 paid hours, a meeting will be scheduled between the reviewer and the employee to review job roles, responsibilities, and progress and performance expectations. Probationary Employment Assessment Report Phase II (HR0105 F3) will be completed, reviewed with the employee and forwarded to HR. If the employee is not meeting performance expectations, either a weekly or biweekly review may be required to assist the employee in the new position or their employment relationship will be ended at this time.
- Just prior to the employee completing 6 months/910 paid hours of employment, a meeting will be scheduled between the reviewer and the employee to review job roles, responsibilities, progress and performance expectations. Probationary Employment Assessment Report Phase III (HR0105 F4) will be completed, reviewed with the employee and forwarded to HR. If the employee at this time has not met performance expectations their employment relationship will be ended or at the sole discretion of the direct supervisor, the probationary period may be extended up to an additional four hundred and fifty-five (455) hours.
- Notwithstanding, at any time during the probationary period SMDHU may end the employment relationship when it is deemed appropriate to do so.

After Probation and Upon Transfers to New Non-Probationary Positions

- When the employee has been in a new position for three months/455 paid hours, a meeting will be scheduled between the reviewer and the employee to review job roles, responsibilities, and progress and performance expectations. If the employee is not meeting performance expectations, a weekly or biweekly review is required to assist the employee in their new position.

- A formal Employment Assessment Report will be completed when an employee completes six months/910 paid hours of service in their new position.
- A formal department or Employment Assessment Report or HR0105(F7) will be conducted after the individual has been in the position for one year and then a minimum of every three years after that.
- An employee who changes program or position either permanently or temporarily will revert to the original performance review schedule starting with a six-month review.
- A formal PER may be conducted at the request of either the reviewer or the employee.
- An employee who is not working in their permanent position for an extended period of time (i.e., extended leave or working in another position/program) will have the performance review schedule for their permanent position suspended and rescheduled based on the amount of time they were away from their permanent position.
- Employee performance will be evaluated at: 1 month (151 paid hours), 3 month (455 paid hours), just prior to 6 months (910 paid hours), 12 months (1820 paid hours), year 3, and then every 3 years thereafter.

b) A dialogue:

- The reviewer and the employee will meet face to face to discuss their respective assessments of past performance and define performance goals for the future.

c) Documented:

- Performance feedback will be based on the employee's position description and preferably jointly established goals for performance. Should goals not be jointly agreed upon the employee's direct supervisor shall determine the performance goals to be achieved by the employee.
- Performance feedback, framed in terms of observed behaviours and goals for future performance, will be shared, discussed, documented, reviewed and signed by the direct supervisor. It is preferable that both parties sign the PER. However, should an employee choose not to sign the PER the supervisor shall indicate on the PER that the PER was discussed with the employee, a copy given to the employee and the employee chose not to sign the PER.
- The original document will be filed in the employee's personnel file within Human Resources.

Procedures

Human Resources Responsibilities:

1. Upon the hiring of a new employee, Human Resources will forward a link to an electronic copy of the three Probationary Employment Assessment Reports to the employee's immediate Supervisor.
2. Human Resources shall monitor the completion of the three Probationary Employment Assessment Reports and if necessary, send a reminder to the immediate Supervisor with a copy to the Supervisor's direct Manager or Vice

President/MOH. The employee's immediate Supervisor is responsible for ensuring the Probationary Reports are completed on time and forwarded to Human Resources.

3. Human Resources will provide the reviewer with a performance review report in January outlining the performance reviews due for the current year. Follow up reports will be generated in June and September.
4. Human Resources will provide the Vice President with a department performance review report following the same schedule as outlined in # 3.

Department Responsibilities:

1. The reviewer will schedule probationary reviews with the employee at one month, three months and just prior to six months of employment and forward the completed forms to Human Resources in a timely manner.
2. The reviewer will schedule performance reviews in accordance with the schedule provided by Human Resources.
3. Any required changes or discrepancies with the performance review schedule will be identified by the reviewer and forwarded to Human Resources for change in the HRIS system.
4. All non probationary performance reviews will have a Performance Review Coversheet HR0105 (F1) attached to the front of the performance review.
5. Once the performance review is completed, it is signed by the employee and reviewer and the original is forwarded to the Vice President for review and initial.
6. The reviewer or designate will make a copy of the performance review for the employee and one for the department area file.
7. Once reviewed and initialed, the Vice President will forward the original performance review to Human Resources.

Related Policies

N/A

Related Forms

HR0105 (F1) Performance Review Coversheet

Probationary

HR0105 (F2) Probationary Employment Assessment Report Phase I

HR0105 (F3) Probationary Employment Assessment Report Phase II

HR0105 (F4) Probationary Employment Assessment Report Phase III

Non-Probationary

HR0105 (F5) Employment Assessment Report Six Month Review

HR0105 (F6) Employment Assessment Report Twelve Month Review

HR0105 (F7) Performance Evaluation Report One to Three Year

Final Approval Signature: _____

Review/Revision History:

Approved: December 19, 1990

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September 2010 Policy Number Change – previous number B3.070

Revised: September 26, 2012

Revised: October 2017, Non-Probationary forms added

Revised: October 2020 update of process and Vice President title.

Revised: August 9, 2023, Probation extension option