Performance Appraisal Form  
- Administrative and Program Support Services -

Employee Name: ____________________________  Current Pay Step: ____________________________

Position Title: ______________________________ Supervisor’s Name: _________________________

Location: ________________________________  Anniversary Date: ____________________________

Period covered by this appraisal: __________ to: ____________________________

Performance Management Guidelines: Check the appropriate rating that best describes the employee’s performance for each category.

<table>
<thead>
<tr>
<th>Rating Number</th>
<th>DEFINITION OF PERFORMANCE MANAGEMENT GUIDELINES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Does Not Meet Expectations  Does not meet most of the principle expectations of the position leaving considerable room for improvement.</td>
</tr>
<tr>
<td>2</td>
<td>Meets Some Expectations  Meets some of the expectations, but not all, leaving some room for improvement.</td>
</tr>
<tr>
<td>3</td>
<td>Meets Expectations  Expectations have been met without any significant exceptions.</td>
</tr>
<tr>
<td>4</td>
<td>Meets All, Exceeds Some  Meets all and exceeds some of the expectations constituting above-average performance.</td>
</tr>
<tr>
<td>5</td>
<td>Exceeds Expectations  Represents achievement that is consistently and substantially beyond what is normally expected.</td>
</tr>
</tbody>
</table>

### Competencies

<table>
<thead>
<tr>
<th>1) General Accountabilities</th>
<th>1 2 3 4 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Displays a professional attitude towards his/her work and colleagues</td>
<td></td>
</tr>
<tr>
<td>b) Maintains confidentiality and respect of private or sensitive information</td>
<td></td>
</tr>
<tr>
<td>c) Manages time effectively to accomplish his/her goals</td>
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</tr>
<tr>
<td>d) Arrives to work on time and is ready to begin work by scheduled start time</td>
<td></td>
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<tr>
<td>e) Keeps absences to a minimum and makes appropriate arrangements when unable to report to work</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2) Technical Skills</th>
<th>(overall rating)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Demonstrates expertise of the tools required to perform the job function</td>
<td></td>
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<tr>
<td>b) Makes effective use of software tools and seeks support when required</td>
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<tr>
<td>c) Adapts well to changes in technology</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>3) Service Orientation</th>
<th>(overall rating)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Follows through, when asked, on staff inquiries, requests and complaints</td>
<td></td>
</tr>
<tr>
<td>b) Takes personal responsibility for following through or correcting client-service problems</td>
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<tr>
<td>c) Helps others get their job done when required</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>4) Embracing Diversity and Inclusion</th>
<th>(overall rating)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Values diversity and welcomes opportunities to learn about the needs and wishes of other individuals and groups</td>
<td></td>
</tr>
<tr>
<td>b) Is willing and able to build relationships with individuals and adapts behavior to support team members and clients</td>
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<tr>
<td>c) Contributes to a sense of belonging</td>
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</tr>
</tbody>
</table>
### Competencies

<table>
<thead>
<tr>
<th>Competencies</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
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</thead>
<tbody>
<tr>
<td><strong>5) Inspiring engagement</strong></td>
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<tr>
<td>a) Is motivated by continuous improvement efforts and seeks opportunities to be involved in change efforts</td>
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<tr>
<td>b) Collaborates with others for the benefit of the organization</td>
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<tr>
<td>c) Remains positive in the face of challenges and encourages others to do the same</td>
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<tr>
<td>d) Models the values and supports the vision of the organization</td>
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<tr>
<td><strong>6) Leading with Integrity</strong></td>
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<tr>
<td>a) Speaks positively to peers or clients about initiatives or programs even if they are not well-liked</td>
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<tr>
<td>b) Ensures that people are properly informed, reports information accurately</td>
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<tr>
<td>c) Offers opinions which may differ from others in a respectful way</td>
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<tr>
<td>d) Assumes positive intentions of others</td>
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<td><strong>7) Embracing Innovation</strong></td>
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<tr>
<td>a) Generates novel solutions to business problems</td>
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<tr>
<td>b) Suggests new ways to apply existing knowledge; is committed to continuous improvement</td>
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<tr>
<td>c) Suggests improvement to processes/procedures</td>
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<tr>
<td><strong>8) Building Relationships</strong></td>
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<tr>
<td>a) Proactively tries to build effective working relationships with others by providing great service, which includes follow up</td>
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<tr>
<td>b) Willingly shares information with others to promote collaboration</td>
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<td>c) Asks for input from peers and team members</td>
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<tr>
<td>d) Models positive behavior</td>
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<td><strong>9) Health &amp; Safety</strong></td>
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<tr>
<td>a) Maintains a healthy, safe work environment and adheres to all safety regulations and guidelines</td>
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<tr>
<td>b) Documents and reports any safety infractions</td>
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</tbody>
</table>

### Operational/Learning and Development Plan

- Meets the responsibilities as outlined in the attached Operational Plan
- Meets the objectives as outlined in the Learning and Development Plan

### Annual Review or Discussion of Policies and Procedures applicable to the employee’s position

**Employee has reviewed the following:**

- Maintaining a Respectful Community (Policy 4202)
- Employee Code of Conduct (Policy 4129)
- Student Policies and Guidelines
- Privacy and Access to Information (Policy 4139)
- Information Security Management System (Policy 2808)
- Occupational Health and Safety (Policy 4121)
- Quick Copyright Guide for Staff (Controlled Document Ref # 1315.4943)
- Protected Disclosure (Policy 4140)
- Other: (Position specific) (list here)

**Manager has reviewed the following with the Employee:**

- Attendance
- Workload Review

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Any document appearing in paper form is uncontrolled and must be compared to the electronic version.
**Learning and Development**

**Learning and Development Activities (over the last 12 months):**

<table>
<thead>
<tr>
<th>Area</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Learning and Development Plan for the Employee for next period:**

(With the employee’s assistance, outline goals, objectives and performance expectations for the upcoming year. Identify training or professional development opportunities that would benefit the employee in the next year. Indicate how you will work to support the development plans of the employee.)

<table>
<thead>
<tr>
<th>Learning Objectives</th>
<th>Method of Achievement and Timeline</th>
<th>Indicators of Achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Review of Areas for improvement from last review period:**

<table>
<thead>
<tr>
<th>Area for improvement from last review period</th>
<th>Is there further improvement required? If so, indicate action to be taken</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supervisor’s Analysis: (Performance Appraisal, Operational Plan, 360 Review, Learning and Development Plan)**

<table>
<thead>
<tr>
<th>Analysis Details</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Overall Performance Rating

Does not meet expectations ☐  Meets some expectations ☐  Meets all expectations ☐
Meets all, exceeds some expectations ☐  Exceeds expectations ☐

___ I recommend that this employee receive ____ steps on the salary range.
___ I do not recommend a salary increase.
___ N/A

Supervisor’s signature: ______________________________________  Date: _________________________________

** Management level of approval for re-earnable ________________  Date: _________________________________

Employee’s Comments:

I have read the final report and received a copy of it. I agree _______ or do not agree with the report ______.

Employee’s signature: _________________________________  Date: _________________________________

Attachment(s) ____ (please indicate number of attachments)
## Performance Management Guidelines

<table>
<thead>
<tr>
<th>POOR PERFORMANCE</th>
<th>SATISFACTORY PERFORMANCE</th>
<th>EXCEPTIONAL PERFORMANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Does Not Meet Expectations</strong></td>
<td><strong>Meets Some Expectations</strong></td>
<td><strong>Meets All Expectations</strong></td>
</tr>
<tr>
<td>Does not meet most of the principal expectations of the position.</td>
<td>Meets most of the expectations but not all.</td>
<td>Represents competence and adeptness. Expectations have been met without any significant exceptions.</td>
</tr>
<tr>
<td><strong>Examples:</strong> Employee performs assigned responsibilities in an unsatisfactory manner, has not responded to constructive feedback, or has not improved performance. Quality of work is below what is acceptable, depicts serious shortcomings. Results inadequate.</td>
<td><strong>Examples:</strong> Employee performs satisfactorily in some aspects of his/her assigned responsibilities but not in others. Quality of work is inconsistent. Some difficulties in meeting deadlines. Work requires revision and continual supervision.</td>
<td><strong>Examples:</strong> Employee performs assigned responsibilities consistently throughout the review period. Quality of work is consistently good. Has good work habits, completes projects and tasks thoroughly, meets deadlines and produces consistently acceptable output of work. Work is completed within budget according to responsibilities and objectives.</td>
</tr>
<tr>
<td>Insufficient ability to resolve problems or issues despite guidance and support.</td>
<td>Inconsistent ability to resolve problems or issues despite guidance and support,</td>
<td>Exhibits acceptable ability to resolve problems or issues.</td>
</tr>
<tr>
<td>Have poor working relationships with others. Is not recognized as a team player. Does not provide adequate service.</td>
<td>Does not contribute fully to the team. Some relationship issues have been identified. Provides inconsistent service.</td>
<td>Is a solid member of the unit or team. Is considered to be a team player by peers and regularly volunteers to help others. Provides friendly, quality service. Contributes in a positive way to the overall work climate.</td>
</tr>
<tr>
<td>Is not meeting the workload demands of the position with proper tools and supports in place.</td>
<td>Has difficulty meeting the workload demands of the position with proper tools and supports in place.</td>
<td>Meets the workload demands of the position with little difficulty. Achieves goals and objectives as identified in previous performance review.</td>
</tr>
</tbody>
</table>