Performance Appraisal Form
- Operational Services Workers -

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</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>Meets some of the expectations, but not all, leaving some room for improvement.</td>
</tr>
<tr>
<td>3</td>
<td>Meets Expectations</td>
</tr>
<tr>
<td></td>
<td>Expectations have been met without any significant exceptions.</td>
</tr>
<tr>
<td>4</td>
<td>Meets All, Exceeds Some</td>
</tr>
<tr>
<td></td>
<td>Meets all and exceeds some of the expectations constituting above-average performance.</td>
</tr>
<tr>
<td>5</td>
<td>Exceeds Expectations</td>
</tr>
<tr>
<td></td>
<td>Represents achievement that is consistently and substantially beyond what is normally expected.</td>
</tr>
</tbody>
</table>

Competencies

1) General Accountabilities
   a) Displays a professional attitude towards his/her work and co-workers
   b) Accepts and gives feedback in a polite and fair manner
   c) Arrives to work on time and is ready to begin work by scheduled start time
   d) Keeps absences to a minimum and makes appropriate arrangements when unable to report to work
   e) Observes prescribed rest and meal periods
   f) Manages time effectively to accomplish his/her goals

2) Service Orientation
   a) Provides quality and timely service
   b) Keeps supervisor up-to-date by providing timely progress reports
   c) Alters normal procedures, as appropriate, to fit a specific situation to get a job done and/or meet organizational goals, e.g., takes on co-workers’ tasks when needed
   d) Realizes when a new approach is necessary and readily accepts changes to work procedures

3) Embracing Diversity and Inclusion
   a) Values and respects others
   b) Treats others fairly and with empathy
   c) Helps others to feel welcome and included
   d) Holds values supportive of diversity and inclusion

4) Inspiring Engagement
   a) Exercises positivity in daily interactions
   b) Demonstrates enthusiasm for involvement, and for the organization, team, work, etc.
   c) Understands the process and rational for change and remains positive in the face of change
### 5) Leading with Integrity (overall rating)
- a) Demonstrates honesty and keeps commitments
- b) Lives the organization’s vision and values
- c) Follows organizational policies and procedures
- d) Seeks to identify and consider different ethical aspects of a situation when making decisions

### 6) Embracing Innovation (overall rating)
- a) Is flexible and supportive of changes to business practices
- b) Learns from experiences and seeks to improve
- c) Explores different approaches and solutions to problems

### 7) Building Relationships (overall rating)
- a) Works well with others to accomplish tasks and assignments
- b) Supports group decisions even if not in total agreement
- c) Treats colleagues with respect and demonstrates willingness to work as part of a team
- d) Assists team members and others by pitching in when needed

### 8) Health & Safety (overall rating)
- a) Maintains a healthy, safe work environment and adheres to all safety regulations and guidelines
- b) Documents and reports any safety infractions

### 9) Team Leadership (applies only to supervisor) (overall rating)
- a) 360 feedback review
- b) Is transparent, frank, fair and shares information openly; explains the reasons for a decision, action, etc.
- c) Encourages communication, openness and consultation in own team
- d) Demonstrates NBCC values and encourages other team members to do the same
- e) Ensures that team members understand their roles and expresses positive expectations of individuals and the team
- f) Instructs and trains all employees in requirements of Occupational Health and Safety under their direction
- g) Ensures that safe work methods and practices are fully understood and adhered to
- h) Ensures that all required safety equipment is being used
- i) Empowers team members. Shares credit for successes
- j) Coaches team members and gives specific behavioural feedback to help team members excel
- k) Holds self and others accountable for actions, for delivering on common goals and providing services consistent with NBCC values
- l) Addresses dilemmas, performance issues, conflicts in a respectful manner

### Annual Review 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)
- Occupational Health and Safety (Policy 4121)
- Information Security Management System (Policy 2808)
- Protected Disclosure (Policy 4140)
- Other: (position specific) (list here)

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

- Attendance
- Workload Review
## Learning and Development

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


### 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)


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

Version 6.0 4000.5095 Performance Appraisal Form – Operational Services Workers
### Overall Performance Rating

<table>
<thead>
<tr>
<th>Does not meet expectations</th>
<th>Meets some expectations</th>
<th>Meets all expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meets all, exceeds some expectations</td>
<td>Exceeds expectations</td>
<td></td>
</tr>
</tbody>
</table>

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

**Supervisor’s signature:** _____________________________  **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 adaptability. Expectations have been met without any significant exceptions.</td>
</tr>
<tr>
<td>Examples: Employee performs assigned responsibilities in an unsatisfactory manner, has not responded to constructive feedback, or has not improved performance. Quantity of work is below what is acceptable, depicts serious shortcomings. Results inadequate.</td>
<td></td>
<td></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>

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