

PEI ECONOMIC DEVELOPMENT AND TOURISM MINISTRY EMPLOYEE PERFORMANCE REVIEW & PROFESSIONAL DEVELOPMENT PLAN

PURPOSE:

The **Employee Performance Review & Professional Development Plan** is a participatory process between the employee and his/her supervisor that allows feedback on employee performance. It links the individual's work plans and performance to the organization's mission and strategic plan. It is a tool to facilitate: a) enhanced communication between the employee and supervisor; b) recognition of employees' accomplishments; c) increased accountability through record of performance; d) identification of a professional development plan; and e) joint problem solving in areas requiring improvement. **Ideally, feedback is an ongoing process.**

INSTRUCTIONS:

The **Employee Performance Review & Professional Development Plan** is made up of four parts plus an **Evaluation Guide for Performance Reviews**.

Part 1 is the **Employee Performance Review** which appraises the employee's performance (and skills/knowledge) in achieving results in areas where the employee has responsibility in meeting specific goals which relate to the overall mission and goals of the Development and Technology Ministry.

Part 2 is the **Employee Work Plan** which outlines the goals and expected results to be achieved over the next performance cycle. The goals should be stated in measurable terms.

Part 3 is the **Professional Development Plan** which identifies areas of training and development to be completed by the employee over the next period which will help them achieve their work plan goals as well as his/her career development interests.

Part 4 is the **Interview Summary Report** which includes comments by both the employee and evaluator as well as a recommendation for a merit/step increase or classification review if applicable.

The supervisor/evaluator and the employee meet to review and complete the **Employee Performance Review & Professional Development Plan**. Parts 1 to 3 can be completed individually and/or jointly by the employee and the evaluator prior to the meeting, depending on the format preferred. Upon completion, Part 4 is completed and signed. A copy is given to the employee and the signed original shall be forwarded to Human Resources.

The **Employee Work Plan and Professional Development Plan** are to be reviewed and updated annually but it is recommended that the supervisor and employee agree to meet periodically throughout the year for feedback and to review progress.

PART 1

EMPLOYEE PERFORMANCE REVIEW

Employee: _____ **Division:** _____

Position: _____ **Current Classification:** _____ **Step:** _____

Length of Service in Current Position: _____ **Period Covered:** _____

Supervisor/Evaluator: _____ **Date:** _____

Leave during last fiscal year: Sick: _____ **Special:** _____

Training and Development Days: _____

Employee's Role and Responsibilities:

Major Goals:

List the major goals worked on over last review period. (Set at previous review)

Goal #1: _____

Goal #2: _____

Goal #3: _____

Goal #4: _____

Goal #5: _____

Performance Appraisal:

	Skill/Knowledge/Behaviour	Rating*	Comments
1	Work planning, organization and achievement of objectives		
2	Quality of work		
3	Demonstrates sound judgement		
4	Demonstrates the ability to gain the respect and confidence of clients/staff		
5	Communicates effectively in writing		
6	Communicates effectively orally		
7	Demonstrates knowledge of area of expertise and uses it effectively		
8	Works effectively as a team member and cooperates with supervisors and other staff		
9	Overall performance		

Comments and/or examples of exceptional strengths, accomplishments and/or areas for development:

Employee's Signature: _____

Date: _____

Evaluator's Signature: _____

Date: _____

* **Ratings:** 1= Excellent; 2=Above Average; 3 = Average; 4 = Needs Improvement;
5 = Unsatisfactory

See Evaluation Guide for Performance Reviews for areas to consider when determining ratings.

PART 2

EMPLOYEE WORK PLAN

Employee Name: _____ **Date:** _____

The **Employee Work Plan** outlines goals stated in measurable terms along with expected results which are to be achieved over the next performance cycle. *Complete "Results Achieved" for next review.* The employee's goals should be in support of the mission.

Goal #1: _____

Results Achieved/Factors Affecting Results: _____

Goal #2: _____

Results Achieved/Factors Affecting Results: _____

Goal #3: _____

Results Achieved/Factors Affecting Results: _____

Goal #4: _____

Results Achieved/Factors Affecting Results: _____

Goal # 5: _____

Results Achieved/Factors Affecting Results: _____

Employee's Signature: _____ **Date:** _____

Evaluator's Signature: _____ **Date:** _____

Keep copy for ongoing reference; attach completed copy to follow up review. _____

PART 3

PROFESSIONAL DEVELOPMENT PLAN

Employee Name: _____ **Date:** _____

Identify **training and professional development interests** which would help in the achievement of work plans, increase present job effectiveness and satisfaction and advance career plans. Consider technical skills, personal development opportunities, career development programs, etc.

Training and Professional Development Opportunities:

<u>Course Title/Training Opportunity</u>	<u>Description</u>	<u>Date Completed</u>
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1. _____
2. _____
3. _____
4. _____
5. _____

Identify support to be provided by the employer.

Employee's Signature: _____ **Date:** _____

Evaluator's Signature: _____ **Date:** _____

PART 4

INTERVIEW REPORT SUMMARY

Employee Name: _____ **Date:** _____

The supervisor/evaluator must discuss with the employee the results of the **Employee Performance Review and Professional Development Plan**. The employee then records any comments they wish to make. This is an opportunity to get feedback from the employee about interaction with and support from the supervisor as well as for other feedback and suggestions which may contribute towards the organization/work unit running more effectively. Next, the evaluator records comments. The evaluator and employee must sign the report. A copy is given to the employee and the signed original is forwarded to Human Resources.

Employee's Comments: _____

Supervisor's/Evaluator's Comments: _____

Employee's Signature: _____ **Date:** _____

Evaluator's Signature: _____ **Date:** _____

Should the classification be reviewed? Yes No

If yes, why? _____

Has the employee successfully completed the 12 month probationary period and is recommended for permanent status?

Yes No

Is the employee recommended for merit/step increase, if applicable?

Yes No

Current Salary: \$ _____ **Range:** \$ _____ **To:** \$ _____

Proposed Salary: \$ _____ **Classification Level** _____ **Step:** _____

CEO Approval: _____

Deputy Minister Approval: _____

EVALUATION GUIDE FOR PERFORMANCE REVIEWS

The following considerations are intended to serve as a guide in determining the most appropriate evaluation of each factor on the **Employee Performance Review** form:

1. Work Planning, Organization and Achievement of Objectives

This factor covers the ability to plan one's own work and, for those with supervisory responsibility, the ability to plan the work of others, and the degree to which objectives are achieved.

- Consider:**
- Does the employee rush into things before thinking about what they are trying to accomplish?
 - Does the employee foresee all the main elements of a problem?
 - Does the employee plan logical sequences of work and optimum use of staff available at their disposal?
 - Can the employee adjust his/her plans quickly and effectively when events make a change necessary?
 - Is the employee's work usually complete and thorough?
 - Does the employee achieve or exceed objectives which were set?
 - Is the employee a self-starter?

2. Quality of Work

This factor assesses the degree of thoroughness and effectiveness of the work done by the employee.

- Consider:**
- Does the employee usually do assigned work thoroughly or were short cuts frequently taken?
 - Does the employee perform most assigned tasks correctly or were mistakes often made?
 - Does the employee adhere to Corporation policies and procedures?
 - Does the employee often have to do the same job over again due to carelessness?

3. Judgment

This factor assesses the extent to which the employee exercises sound judgement.

- Consider:**
- Did the employee analyze problem situations quickly and accurately and sort out the important from the unimportant?
 - Did the employee act or react in a logical and practical manner?
 - Did the employee usually make sound decisions when faced with the need to do so?
 - Was the employee usually correct in estimates of how people and events would turn out?
 - Can the employee's judgement be trusted?

4. Earning Clients' Respect and Confidence

This factor assesses the degree to which the employee earned client approval. The ability to do so becomes increasingly important as a person's responsibilities increase.

- Consider:**
- Does the employee get along well with clients?
 - Do clients turn to the employee for (or welcome) opinions or ideas?
 - Does the employee annoy clients?
 - Has the employee developed a close relationship with his/her clients?
 - Does the employee bring new clients to the Corporation?

5. Communicating in Writing

This factor assesses the employee's ability to write clearly and concisely. This is important to the Corporation, particularly at more senior levels.

- Consider:** Is the employee's vocabulary adequate?
- Are the employee's reports and letters well organized and clear, or do they require considerable revision?
- Is the employee's judgement good concerning amount of detail required in a report or letter?

6. Communicating Orally

This factor assesses the employee's ability to communicate well orally.

- Consider:** Do people understand the employee when asked questions or given instructions?
- On being given information or instruction, does the employee get them correct?
- Does the employee talk too much? Or too little?
- Does the employee speak in a well ordered way or tend to ramble?

7. Technical/Professional Knowledge

This factor assesses how the employee demonstrates technical and/or professional knowledge and how effectively it is used.

- Consider:** Does the employee read relevant journals regularly to keep informed of current affairs related to the Corporation and the employee's role?
- Does the employee take courses and/or seminars?
- Does the employee effectively utilize his/her expertise in a practical way in assisting clients?

8. Effectiveness of Relationships

This factor assesses the effectiveness with which the employee deals with people.

- Consider:** Does the employee enjoy the respect of subordinates, superiors and fellow workers?
- Does the employee treat subordinates fairly and provide them with effective leadership?
- Does the employee co-operate fully with other employees?
- Is work coordinated with that of others when necessary?
- Does the employee willingly accept direction and constructive criticism from supervisor?