



Title: EMPLOYEE DEVELOPMENT / JOB PLANNING POLICY FOR NON-UNION EMPLOYEES		Number: 8019
Reference: Personnel Policy Manual	Adopted by City Council: April 5, 1988	Supersedes:
Prepared by: PERSONNEL SERVICES DEPARTMENT		

STATEMENT

THE CITY OF MEDICINE HAT HAS A COMMITMENT TO ATTRACT, DEVELOP AND RETAIN A WELL QUALIFIED, MOTIVATED AND COMMITTED WORKFORCE. EACH EMPLOYEE AND MANAGER SHALL DEVELOP STANDARDS AND OBJECTIVES ESTABLISHED WITHIN THE REQUIREMENTS OF THE JOB DESCRIPTION.

PURPOSE

1. To provide a forum for feedback to employees on their individual job standards and objectives.
2. To identify and establish an appropriate employee development plan to enhance employee self-esteem and improve or maintain future performance.
3. To provide a basis for management and personnel decisions (e.g. training, career development and promotional opportunities).

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1. DEFINITIONS

1.01 Non-Union Personnel

Any person occupying a position, approved by the Wages & Personnel Committee, which is designated non-union, and not covered by a bargaining unit.

1.02 Anniversary Date

The date (day and month) on which the employee commenced in the position. The anniversary date shall be adjusted following any leave of absence without pay exceeding fourteen (14) calendar days.

1.03 Annual Performance Review

A meeting held to review performance and develop standards and objectives for a twelve (12) month period.

1.04 Interim Performance Review

A meeting held to assess an employee's ability to satisfactorily meet standards at the three (3) month and six (6) month intervals during the first year of employment, and at six (6) month intervals between annual performance reviews.

1.05 Planning Meeting

A meeting to discuss the responsibilities of the employee's position and outline the employee's standards and objectives for the initial twelve (12) month period. Subsequent planning meetings are held in conjunction with the annual performance review.

1.06 Job Parts

The major duties and responsibilities assigned to a position.

1.07 Standards

The level of performance expectation established by the employee and the person carrying out the performance review. The standards describe when performance is satisfactory for each job part.

1.08 Objectives

The results an employee endeavors to achieve.

1.09 Job Description

A statement of the major duties and responsibilities of a position, its organizational relationships, the necessary knowledge and skills required and the desirable training and experience.

2. RESPONSIBILITIES

2.01 City Council

(a) Receive, review, amend and adopt any recommended changes to the Employee Development/Job Planning Policy.

2.02 Mayor

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- (a) Carry out planning meetings and performance reviews with each employee reporting directly to City Council.
- (b) Review planning meetings and performance reviews completed by the employees reporting to City Council as the Mayor deems necessary.
- (c) Ensure that the employees reporting to City Council receive training and development as identified through the planning process.

2.03 Board of Commissioners

- (a) Make recommendations to City Council regarding any amendments to the Employee Development/Job Planning Policy.
- (b) Review and adopt Procedures which are utilized to implement the Employee Development/Job Planning Policy.

2.04 Each Commissioner

- (a) Carry out planning meetings and performance reviews with each employee reporting to the Commissioner.
- (b) Review planning meetings and performance reviews completed by employees reporting to the Commissioner, if deemed necessary by the Commissioner.
- (c) Ensure that the employees reporting to the commissioner receive training and development as identified through the planning process.

2.05 Department Heads/Managers

- (a) Carry out planning meetings and performance reviews with each employee reporting to them.
- (b) Review planning meetings and performance reviews completed for each employee within their department, as they deem necessary.
- (c) Ensure that the employees reporting to them receive training and development as identified through the planning process.

2.06 Personnel Services Department

- (a) Administer, interpret and monitor the effectiveness of the Employee Development/Job Planning Policy and Procedures.
- (b) Administer a bring-forward system to advise all parties carrying out planning meetings and performance reviews of review dates, pursuant to the Employee Development/Job Planning Policy.
- (c) Collect and retain on file completed job planning forms for a period of five (5) years.
- (d) Provide advice with respect to the Employee Development/Job Planning Policy and Procedures.
- (e) Provide advice with respect to employee's training and development needs as identified through the planning process.
- (f) Co-ordinate training of employees as to the Employee Development/Job Planning Policy and Procedures.
- (g) Provide reports as requested by The Board of Commissioners.
- (h) Make recommendations to The Board of Commissioners regarding amendments to the Employee Development/Job Planning Policy and Procedures.

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3. PROCEDURES

3.01 General

- (a) Employees shall participate in the establishing of standards, setting of objectives and the assessment of results achieved within the requirements of their job description.
- (b) Informal reviews of standards shall occur on an on-going basis, as required during the review period.
- (c) At each planning meeting and annual performance review, the employee and the person carrying out the performance review shall identify and define the requisite standards and objectives. These standards and objectives may be revised at any time during the twelve (12) month review period.
- (d) At each performance review, the employee's ability to meet established standards and objectives shall be assessed.
- (e) Planning meetings and performance reviews shall be completed as per instructions on the appropriate form.
- (f) Planning meetings and performance reviews due while an employee is on a leave of absence shall be completed prior to the leave where possible.

3.02 Time Frames

- (a) Each annual performance review shall be carried out within twenty-one (21) days of the employee's anniversary date.
- (b) Each interim performance review shall be carried out within seven (7) days of the three (3) month or six (6) month interval, as the case may be.
- (c) Part I of the completed Job Planning Form shall be forwarded to the Personnel Services Department by the person carrying out the performance review:
 - (1) In the case of an annual performance review, within thirty (30) days of the annual performance review.
 - (2) In the case of an interim performance review, within fourteen (14) days of the interim performance review.

4. ATTACHMENTS

4.01 Administrative Details for Employee Development/Job Planning Review

4.02 Employee Development/Job Planning Review Guide

4.03 Employee Development/Job Planning Form

PERSONNEL SERVICES DEPARTMENT

ADMINISTRATIVE DETAILS

FOR

EMPLOYEE DEVELOPMENT / JOB PLANNING

REVIEW

April, 1988

EMPLOYEE DEVELOPMENT / JOB PLANNING REVIEW

FREQUENCY OF JOB PLANNING REVIEWS:

1. Annual Performance Review – prepare every twelve (12) month period and completed in relation to the employee's anniversary date.
2. Interim Performance Review – prepare at the three (3) month and (6) month interval during the first year of employment in the position and at the six (6) month interval in subsequent years.

TIME FRAME:

PERSONNEL SERVICES TO:

1. Access the bring-forward system the first working day of each week to determine annual performance reviews due sixty (60) days thereafter for each day of that week, and advise the designated reviewer that Part 1 of the Job Planning Form must be completed and received by the Personnel Services Department within thirty (30) days of the annual performance review date.
2. Also determine interim performance reviews due forty (4) days thereafter for each day of that week, and advise the designated reviewer that Part 1 of the Job Planning Form must be completed and received by the Personnel Services Department within fourteen (14) days of the interim performance review date.

PAYROLL TO:

1. Advise the Manager of Personnel Services of the following employee status changes:
 - (a) newly hired employees
 - (b) transfers (provide the name of the new Manager to whom the employee will be reporting):
 - lateral
 - demotion
 - promotion
 - intra/inter-departmental
 - (c) leaves of absence
 - (d) terminations

DISTRIBUTION OF FORMS:

1. Initially, the Personnel Services Department will provide all departments with Employee Development/Job Planning Forms.

RECORD RETENTION AND ACCESSIBILITY:

1. All original completed Job Planning Forms (Part 1) shall be retained for a period of five (5) years from the date of completion (one file for every non-union employee).
2. All original completed Job Planning Forms (Part 1) shall be retained in the individual Employee Development / Job Planning Review file.
3. All employees shall have access to their own Job Planning Review records.
4. The employees' Manager shall be able to access such records.
5. If the employee applies for another position in the City, the records shall be made available to the Manager of the position being applied for.
6. If an employee is being considered for another position in the city which he / she has not applied for, file access shall be requested by the interested Commissioner. Approval for access to the file shall be secured from the Commissioner of the Division in which the employee works.

PERSONNEL SERVICES DEPARTMENT FORMS:

- | | |
|----------------|--|
| Attachment I | Employee Status Changes form to be completed by Payroll for every new hire, transfer, leave of absence or termination. |
| Attachment II | Form Memorandum advising reviewer and appraiser of due date for annual and interim reviews. |
| Attachment III | Follow-up Memorandum regarding overdue reviews – to be sent one week following review due date. |

ATTACHMENT I

EMPLOYEE STATUS CHANGES

	STARTING/ ANNIVERSARY DATE	TRANSFERS			PROMOTIONS			LEAVE OF ABSENCE		TERMINATION
		FROM DEPT	TO DEPT	DATE	FROM POSITION	TO POSITION	DATE	DATE FROM TO	NEW ANNIVERSARY	
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										
NAME: _____ EMPLOYEE NO. _____ DEPT. _____ POSITION: _____										

ATTACHMENT II

MEMORANDUM

TO: (1) DATE: (2)

FROM: Ed G. Steele, Manager
Personnel Services Department

RE: Employee Development/Job
Planning Review - (3)

Please complete the above-noted form in regard to _____[4]_____,
_____ [4]_____.

We would appreciate receiving the completed Employee Development/Job
Planning Review Part 1 on or before _____[5]_____, 1988.
Should you require a copy of the job description on file, please contact
the Personnel Services Department.

Ed G. Steele, Manager

cc:6

- [1] His Worship, Mayor Ted Grimm
Commissioner - name and title
Designated Council Department Head - name and title
- [2] Current Date
- [3] Planning Meeting
Annual Performance Review
Interim Performance Review
- [4] Employee's name and title/position
- [5] Completion Due Date
- [6] Reviewer - name and title

ATTACHMENT III

MEMORANDUM

TO: (1) DATE: (2)

FROM: Ed G. Steele, Manager
Personnel Services Department

RE: Employee Development/Job
Planning Review - (3)

Please be advised that the _____[3]_____, on
_____ [4]_____ was due on _____[5]_____.

We would appreciate your ensuring that the completed Employee
Development/Job Planning Review Part 1 for the _____[3]_____
is forwarded to the Personnel Services Department on or before
_____ [6]_____ 1988.

Ed G. Steele, Manager

cc:[7]

- [1] Commissioner - name and title
Designated Council Department Head - name and title
- [2] Current Date
- [3] Annual Performance Review
Interim Performance Review
- [4] Employee's name and title/position
- [5] Review Completion Due Date
- [6] Extended Due Date
- [7] Reviewer - name and title

CITY OF MEDICINE HAT

**EMPLOYEE DEVELOPMENT/JOB PLANNING
REVIEW GUIDE**

**Personnel Services Department
April, 1988**

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INTRODUCTION

The Employee Development/Job Planning Review Guide has been established to provide guidelines in assessing how effectively and efficiently each employee performs his/her job.

The review of an employee's job standards is an on-going process and is an integral part of the day-to-day relationship between the Manager and the employee. It is important that the Manager and the employee share a common understanding as to what constitutes satisfactory job standards. This understanding can be achieved through a formal one-on-one discussion--the Employee Development/Job Planning Review. Review meetings provide a valuable opportunity for dialogue and mutual exchange regarding specific areas of strength, areas of needed improvement, new work plans and training and development plans. The greater the employee's involvement in the job planning process, the greater the chance of the employee achieving the agreed standards and objectives.

For further information regarding the job planning review process, please direct inquiries to respective Managers, or the Manager of Personnel Services.

OBJECTIVES

Major objectives of the Employee Development/Job Planning Policy and Procedures are to:

- . provide a forum for feedback to employees on their ability to meet standards and objectives
 - . encourage communication between Manager and employee
 - . clarify job expectations
 - . identify standards not being achieved
 - . identify required changes in skills/behaviour
 - . offer positive reinforcement of good achievements
- . identify and establish an appropriate employee skill development plan to improve or maintain future planning for personal objective
 - . set annual job standards and objectives
 - . assess future potential for employees
 - . identify specific training and development needs
 - . provide positive support and opportunity to develop skills
- . provide a basis for management and personnel decisions
 - . training to enhance career development
 - . promotional opportunities
 - . succession planning
 - . shifts in career direction

EMPLOYEE DEVELOPMENT/JOB PLANNING REVIEW PROCESS

1. GENERAL PRINCIPLES

- . the job planning review must be based on job related requirements.
- . to improve ability to meet job standards the employees must participate in the establishing of standards, setting of objectives and the evaluation of results achieved within the requirements of the position.

2. OVERVIEW

The review of an employee's ability to meet job standards is an on-going process consisting of the following steps:

- . planning meeting
- . setting standards and objectives
- . the performance review
- . repeat entire process

3. FREQUENCY/TIME FRAMES OF APPRAISALS

- . Annual Performance Review - prepared every twelve (12) month period and completed in relation to the employee's anniversary date
 - . completed job planning reviews must be received within thirty (30) days of the review date by the Personnel Services Department
- . Interim Performance Review - prepared at the three (3) month and six (6) month interval during the first year of employment and at the six (6) month interval in subsequent years. The review procedure will also apply to employees in new positions.
 - . completed job planning reviews must be received within fourteen (14) days of the review date by the Personnel Services Department.

PLANNING MEETING

The planning meeting is typically the first step in the Employee Development/Job Planning process. The purpose of this meeting is for the Manager and the employee to discuss the responsibilities of the employee's position and outline the standards and employee's objectives for the coming twelve month period.

Generally, the areas addressed in this meeting include:

- . purpose of conducting reviews of an employee's ability to meet standards
- . purpose of the position
 - . identify major job parts
 - . description of activities
 - . review job description
- . how ability to meet standards will be measured
 - . set standards and objectives for the coming twelve (12) month period (refer to "Guidelines in Setting Standards and Objectives" for further details - page 5)
 - . mutually agree to the identified job standards and objectives
 - . establish checkpoints to measure progress
- . identify training and development needs (if applicable)
 - . specify training/development needs to enhance job satisfaction (if deemed necessary)

Planning meetings for newly hired employees or employees assuming a new position shall generally occur within the employee's first week in the new position. All subsequent planning meetings would normally be held in conjunction with the planning meeting and performance reviews. However, amendments to the standards and objectives can occur during the interim performance reviews.

Following the planning meeting, Part 1 of the Employee Development/Job Planning Form is completed, appropriately signed, and retained by the Manager. A copy is provided to the employee.

GUIDELINES IN SETTING STANDARDS AND OBJECTIVES

The standards set for measuring each job part must be:

- . specific
- . consistent
- . realistic
- . attainable
- . measurable
- . results oriented
- . time limited
- . documented

Standards and objectives are usually a series of brief statements outlining the quality and quantity of the work to be achieved and may state such factors as:

- . how (in what manner) it should be done
- . how much should be done
- . how well it should be done
- . how long it should take
- . or a combination of all of the above

Examples of Standards:

- . numbers - hours/units/requests
- . dollars - revenue received/unit costs/resources consumed
- . percentages - overtime/errors/turnover
- . time - flow-time/set-up time/response time
- . completions - services/products provided/acceptance/problems overcome

Some factors to be considered in setting a performance standard may be:

- . past experience and training as they relate to the job description
- . the employee's past performance on the job
- . generally accepted departmental or City standards
- . the overall scope and intent of the position as outlined in the job description

Factors to be considered (con't.)

- . Manager's and employee's mutual agreement on what is reasonable
- . standards established by government regulations or legal licensing boards
- . personal commitment to objectives which are in excess of agreed to standards
- . objectives must be attainable

The procedure for setting standards and objectives is as follows:

Identify Job Parts:

- . refer to the job description
- . list activities to be performed
- . group into major job parts (consolidate list into like or related activities, and title these groups; the title becomes the job part)
- . define each job part (usually under 25 words)

Determine Standards:

- . begin with "Standards are met satisfactorily when ..."
- . state measurable results expected (e.g. may be stated in terms of time, numbers, dollars, references, quantities, etc...)
- . list 2 - 4 standards per job part (some job parts may take more standards to effectively indicate the quality and/or quantity of performance expected)

Set Objectives - the results an employee endeavors to achieve:

- . get commitment
- . specify single result to be accomplished
- . specify target date for accomplishment
- . be as specific and as quantifiable as possible
- . start with "to" and action verb (e.g. to complete, to prepare, to conduct, etc...)

I. PERFORMANCE REVIEW PREPARATION

Both the Manager and the employee share a responsibility towards ensuring that a successful meeting occurs. Both parties should plan and independently prepare to discuss the work results and compare the actual results achieved against the standards of performance which were set at the beginning of the twelve month period (planning meeting).

Manager:

- . advise employee of the purpose, date, time and place of the interview
- . provide employee with the Employee Self Review form for his/her completion
- . review major job parts, standards and the objectives previously established and agreed to--revise if required
- . review and assess employee's ability to meet agreed to standards and personal objectives
- . consider factors that may have affected performance
- . summarize information and prepare tentative action plan and results for meeting
- . review tentative appraisal with reviewer

Employee:

- . complete the Employee Self Review form and return to Manager prior to meeting for discussion
- . review job description and report any significant changes at the meeting
- . suggest appropriate future training and development needs (be as specific as possible)

2. THE PERFORMANCE REVIEW MEETING

The performance review meeting should not be a threatening or uncomfortable situation, and it should hold no surprise for either individual. Both Manager and employee should already know what the results will be as both have the same information about the employee's ability to meet standards, and have talked about it throughout the twelve (12) month period.

The interim performance review provides the opportunity to examine the employee's progress on the job, to review (and perhaps revise) the standards and objectives to be achieved in the job and to plan future work.

The interim and annual performance review shall assess the employee's ability to meet standards for the entire probationary period and previous twelve (12) month period, respectively. The job review and planning section of the form (Part 3 - Section 3A) shall summarize the recent interim performance review completed and more specifically address the latter three (3) month or six (6) month period, respectively for the interim and annual performance reviews. The discussion should cover the following areas in reviewing and documenting the employee's ability to meet standards and objectives:

- . jointly analyze and assess agreed to standards
- . compare actual results against objectives
- . allow the employee to describe their own experience in relation to standards and objectives and use as a basis for discussion
- . encourage employee to accept responsibility for achievement and offer thoughts on improving performance
- . provide recognition, enhance employee motivation and initiative
- . discuss and evaluate training/development plans previously established
- . summarize what has been discussed
- . set date, time and place for follow-up to discuss progress towards targets
- . complete Part 3 of form
- . provide employee with completed and signed copy of form

3. HANDLING DISAGREEMENT

If standards and objectives are discussed completely and openly, common understanding can usually be reached. However, there are times when the opinions of the Manager and the employee are not alike. To reduce defensiveness, and therefore confrontation, demonstrate empathy--make the employee feel that his/her opinion has been heard and understood--without value judgement on the part of the Manager. Showing the employee that his/her viewpoint is being listened to often encourages the employee to listen to the Manager's viewpoint resulting in a shared understanding of goals.

- . listen to the employee's side
- . restate the disagreement as the employee sees it
- . confirm understanding of the employee's point of view
- . ask the employee to state the Manager's side of the disagreement
- . pinpoint the reason for the disagreement
- . discuss ways to resolve the disagreement; be open to further data that might alter the Manager's position
- . if agreement cannot be reached, agree to disagree and document such disagreement
- . focus on future standards to avoid similar occurrences in the future
- . summarize the plans for action discussed to ensure shared understanding and commitment
- . schedule a follow-up session if necessary
- . close the interview on a positive note

4. TRAINING AND DEVELOPMENT PLAN

Although each individual is ultimately responsible for his/her own development, Managers are responsible for the operation and development of their areas. Employee development is a mutual responsibility and both Manager and employee should take an active interest in ensuring that plans made for training and development are carried out. Some reasons for development may be prompted by:

- . changes in the duties of the position
- . deficiencies in the employee's past performance
- . desire to improve in specific performance areas which are already adequately performed
- . preparations for different duties/positions

Training and development plans should:

- . build on strengths
- . help overcome weaknesses
- . help maximize potential
- . consider the personal expectations of the employee
- . be based on needs that are consistent with the organization
- . be planned and mutually agreed upon by the employee and Manager
- . allow a reasonable amount of time for the employee to apply or demonstrate the skill or knowledge acquired

Where training programs and resources are available, approval for the employee to attend the program should be obtained and commitments made accordingly. Where appropriate programs are not available, Personnel Services Department should be contacted.

JOB PLANNING REVIEW SKILLS

Noted below are some job planning review skills used during the review meeting.

I. Introduction

State benefits

- . purpose of the discussion
- . benefits to the employee
- . benefits to the Manager
- . benefits to the working relationship
- . benefits to the City

Outline discussion

- . general areas to discuss
- . specific area to start with

II. Body of the Meeting

Share understanding

Question

- . directive manner
- . non-directive manner

Reinforce

- . indicate understanding
- . show acceptance
- . build self-worth
- . reinforce for real accomplishment

Reflect

- . identify message
- . paraphrase as a question

Summarize understanding

- . restate findings
- . confirm

Initiate resolution

- . state each other's position satisfactorily
- . summarize areas of agreement and disagreement

Develop action plan

- . identify objectives and possible obstacles
- . seek solutions
- . ask for and/or offer suggestions
- . evaluate suggestion
- . finalize plan and direction

III. Conclusion

Review action plans

- . state what has to be done and when
- . encourage employee involvement

Document

Close meeting on a friendly note

Thank employee

The following guidelines are the framework in which the job planning review skills are used:

- . emphasize the employee's role in the meeting
- . agree on job parts and standards beforehand and reach a common understanding
- . focus on meeting job standards and objectives
- . use skills to guide, remove defensiveness and allow self-discovery
- . jointly commit to documented action plans
- . focus on specific problem areas
- . center two-way discussion on appropriate input
- . control through skill use, not position dominance

RECORD RETENTION AND ACCESSIBILITY

The original of Part 1 of the Employee Development/Job Planning Form shall be sent to the Personnel Services Department after all appropriate parties have signed the form. These records shall be kept for five (5) years in individual Employee Development/Job Planning files. In addition, the Manager and the employee may retain a copy of such records.

It is very important that the planning meeting and performance review results be kept confidential. Make sure the documents are accessible only to those with a legitimate right to use them, i.e.:

- . all employees shall have access to their own planning meeting and performance review records.
- . the employee's immediate Manager/Department Head/Commissioner who are in direct chain of command shall be able to access such records.
- . if the employee applies for another position in the City, Part 1 of the Employee Development/Job Planning Form shall be made available to the Manager of the position being applied for.
- . if an employee is being considered for another position in the City which he/she has not applied for, file access may be requested by the interested Commissioner. Approval for access to the file shall be secured from the Commissioner of the Division in which the employee works.
- . these records shall not be used for reference check purposes by the Personnel Services Department (requests from outside the City). Such requests shall be directed to the immediate Manager of the employee.



city of MEDICINE HAT

EMPLOYEE DEVELOPMENT/ JOB PLANNING FORM

CONFIDENTIAL

Employee Name: _____ Employee No. _____

Position/Title: _____ Department: _____

Review Period: _____ to: _____

Type of Review: Annual _____

Interim _____

INSTRUCTIONS

- PART 1** • Completed, signed and retained by Manager and Employee.
- **SECTION 1A • MAJOR JOB PARTS** • List major job duties and responsibilities assigned to the position in order of importance for the coming 12 month period (refer to job description).
 - **JOB STANDARDS** • A standard established to describe when standard is reached for each job part.
 - **SECTION 1B • OBJECTIVES** • Results an employee endeavors to achieve.
 - **SECTION 1C • TRAINING AND DEVELOPMENT** • Identify specific training and needs.

NOTE: Copies of completed Job Planning forms are distributed to the employee, and the person carrying out the performance review, and the original of Part 1 forwarded to the Manager of Personnel Services in a **confidential** envelope.

PART 1

SECTION 1A:

MAJOR JOB PARTS

JOB STANDARDS

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

if more space is required, please attach separate sheet

SECTION 1B:

EMPLOYEE OBJECTIVES:

if more space is required, please attach separate sheet

SECTION 1C:

TRAINING AND DEVELOPMENT PLAN:

Employee's Signature: _____ Manager's Signature: _____ Date: _____

NOTE: COPY OF THIS SECTION TO BE RETURNED TO PERSONNEL SERVICES

PART 2

EMPLOYEE'S SELF-REVIEW

Instructions: The purpose of this form is to assist you in documenting your personal review based on the standards and objectives agreed to at the planning meeting, as well as your future objectives and career training and development.

JOB ACTIVITIES:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.**CAREER TRAINING AND DEVELOPMENT PLAN:**

OTHER COMMENTS OR CONCERNS:

PART 3

CONFIDENTIAL

Employee Name: _____ Employee No. _____
Position/Title: _____ Department: _____
Review Period: _____ to: _____
Type of Review: Annual _____ Interim _____

INSTRUCTIONS

- PART 3 • SECTION 3A • JOB INTERVIEW AND PLANNING**
 - Completed by the person carrying out the performance review at the end of each review period.
 - In relation to standards and objectives outlined in Section 1A and 1B, describe actual results achieved during review period.
- SECTION 3B • OVERALL ASSESSMENT**
 - Completed by the person carrying out the performance review at the end of each review period, as follows:
 - **Interim Performance Review** – assess employee's ability to meet standards for review period.
 - **Annual Performance Review** – assess employee's ability to meet standards for the previous 12 month period.
 - Considering the results achieved, specify employee's strengths and areas requiring improvement.
 - The person carrying out the performance review signs and dates review.
- SECTION 3C • REVIEWER'S COMMENTS (optional)**
 - Reviewer comments, signs and dates review.
- SECTION 3D • EMPLOYEE'S COMMENTS**
 - Employee comments (if required), signs, and DATES REVIEW.

NOTE: Part 3 is to be retained by the person carrying out the performance review and employee, and will be held in the strictest confidence.

PART 3

SECTION 3A - JOB INTERVIEW AND PLANNING

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal black lines running across the width of the page. The lines are thin and consistent in thickness. There are no margins, text, or other markings on the paper.

PART 3

SECTION 3B - OVERALL ASSESSMENT SUMMARY

[illegible]

Manager's Signature

Date _____

SECTION 3C – REVIEWER'S COMMENTS (Optional)

Reviewer's Signature _____

Date _____

SECTION 3D – EMPLOYEE'S COMMENTS

Employee's Signature _____

Date _____