



Performance Review Policy

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| Policy Number: | HR-PM-001 |
| Department: | Human Resources |
| Section: | Performance Management |
| Subject: | Performance Review |
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PURPOSE STATEMENT

The City is committed to building a skilled, knowledgeable, collaborative and progressive organization whose employees actively contribute to the organization's commitment to continuous improvement and success. The City will achieve this by supporting the growth and development of employees through effective performance management strategies.

Completion of a performance review provides a formal method whereby the employee and leader(s) will:

- a. Review past contributions, celebrate accomplishments and identify areas for learning and development to improve and/or enhance performance.
- b. Develop annual performance and training goals and objectives.
- c. Engage in effective communication on a regular and ongoing basis.

The purpose of the City's Performance Review Policy is to align employee performance with the City's Strategic plan and departmental goals and objectives in addition to identifying learning and development for employees.

SCOPE

- a. This policy applies to all employees of the City, with the exception of employees represented by the Barrie Professional Fire Fighters Association.
- b. Employees covered by a collective agreement are subject to the terms and conditions in their respective collective agreements.
- c. In the case of students, part time and full time casual staff, applicable members of CUPE Local 2380 are considered to be leaders for the purpose of conducting performance reviews where applicable.



DEFINITIONS

Leader - An individual who is accountable or has the responsibility for managing or overseeing one or more employee and completes the performance review.

Performance Management - The process of aligning individual performance actions and behaviours to the achievements of corporate and departmental objectives. At the City, the performance management cycle involves three (3) interrelated phases:

1. **Performance Planning** – The leader and employee work together to establish performance expectations, goals and objectives in alignment with the level of the position. These are established at the beginning of the performance management cycle.
2. **Performance Feedback and Coaching** – As the employee works throughout the review period to accomplish the established performance expectations, the leader observes performance and provides ongoing feedback and coaching. It is recommended that regular review meetings be conducted to ensure appropriate communication related to ongoing performance. The employee may also request coaching and feedback to improve/develop performance.
3. **Performance Review** – A rating of an employee's overall performance that formally recognizes, evaluates and documents an employee's contributions against the expectations of the position. The supervisor conducts and documents a formal performance review with each employee on an at least annual basis.

PROCEDURE

General Principles

1. Open, honest and regular feedback between leaders and employees with regards to performance ensures that employees understand what is expected of them in terms of performance results and behaviours.
2. The performance review provides an opportunity for leaders to record the employee's performance on an objective basis and establish a base for assessment of annual step increases in salary, if applicable.
3. The performance review is conducted on an annual basis regardless of whether or not an annual step increase in salary is pending.
4. The process helps to clarify expectations and evaluate results achieved. The performance review form provides opportunities to identify areas for learning and development and to create performance plans. The annual meeting also provides an opportunity for leaders to discuss career paths with their employees.
5. In the event an employee moves to a new permanent position during the review period, the outgoing supervisor will complete a performance review form prior to the employee moving to the new position for the time spent in the position since the last performance review.



6. In the event an employee moves to a temporary position during the review period, the supervisors will collaborate to complete one appraisal or complete two individual performance reviews for the applicable review periods.

Expectations for Employee Groups and Frequency

Senior Leadership Team

1. The performance review will be completed annually for the previous calendar year.
2. A performance plan should be included within the Performance Review Form for the upcoming year.
3. Formal reviews for the CAO will be supplemented through scheduled in camera sessions with Council.

Non-Union Full Time Staff

1. The performance review will be completed annually for the previous calendar year.
2. A performance plan should be included within the Performance Review Form for the upcoming year.

CUPE Employees

1. For permanent employees, the performance review will be completed annually proximate to the anniversary date of hire in the current position with the City, or annually in January of each year for the previous calendar year.
2. For temporary and casual employees, the performance review will be completed upon either of the following, whichever is sooner:
 - a. completion of a total of 1820 (35 hour workers) or 2080 (40 hour workers) regular cumulative hours of employment in the same position or level; or
 - b. at the end of the employment contract in order to be considered for re-employment.
3. A performance plan, where applicable, should be included within the Performance Review Form for the upcoming year.

Permanent and Temporary/Casual Part-time Employees

1. The performance review will be completed, inclusive of the applicable performance review form either:
 - a. Upon completion of the employment period for temporary/casual part-time employees; or
 - b. Prior to a step increase which would be triggered by completion of 18 months in a part-time job for permanent part-time employees and longer term temporary/casual part-time employees; or



- c. Every 18 months for a permanent part-time or temporary part-time employee who has reached the top step in their pay scale.

Performance Review Meeting

1. All supervisors are encouraged to attend corporate training in the creation and delivery of meaningful performance reviews for consistency and effectiveness.
2. The performance review meeting should be booked well in advance (e.g. two to four weeks) to allow everyone involved sufficient time to prepare and should be in person.
3. The supervisor will complete the Employee Information Section and note all objectives set for the review period in the Accomplishments Section, where applicable. The employee will then review the Accomplishments Section and add any further relevant information and return to their supervisor to complete the remaining sections of the form.
4. Feedback from other Department Management within the employee's line management should be sought in advance of the performance review meeting so that it is available to the employee at the performance review meeting.
5. The performance review forms may be augmented with reference material including, but not limited to performance plans, samples of work or performance improvement plans where required.
6. The supervisor will provide the employee a final copy of their performance review form.
7. Once completed, the Performance Review Form should be forwarded to the Human Resources Department via ASK.HR@barrie.ca for the employee's file and a final copy provided to the employee.
8. Should an employee be eligible for a step increase, an Employee Change Form must be completed and sent to HR.Payroll@barrie.ca for all non-union staff.
9. An employee who does not agree with their performance review is encouraged to discuss the matter during the performance review meeting. The employee may also indicate their disagreement with the review in the Employee Comments section. Department Management makes the final decisions on ratings and performance plans.
10. In the event an employee refuses to sign their completed review or register comments, the supervisor will note the refusal on the form. The form will still be circulated for signature and filed in the employee's file as a corporate record.



RESPONSIBILITIES

Employee

It is the responsibility of the employee to:

- a. Understand and comply with the policy associated with performance reviews.
- b. Participate in the performance review meeting, listen to feedback and ask questions to clarify information.
- c. Offer suggestions for improving performance if needed and identify areas for learning and development. If necessary, identify obstacles to performance and suggest solutions.

Department Management

It is the responsibility of Department Management to:

- a. Understand and comply with the policy associated with performance reviews.
- b. Initiate the performance review and performance planning process for direct reports and oversee it for indirect reports.
- c. Provide documented performance reviews for direct reports to the Human Resources Department.

Human Resources Department

It is the responsibility of the Human Resources staff to:

- a. Provide guidance and advice associated with the policy related to performance reviews.
- b. Ensure that training on the performance review process and resources are available department supervisors.

REFERENCES AND RELATED DOCUMENTS

- a. Performance Review Form Templates