



**Toronto and Region Conservation Authority
(TRCA)
Employee Training Aid: Year-end
Review**

October 2020

Year-end Performance Evaluation Form


The **Year-end Performance Evaluation Form** includes four sections.

Goal/Objective Evaluation	Includes the goals created in the Goals/Objectives screen.
Competency Evaluation	Includes the competencies assigned to you in the Competency screen.
Career and Development Planning	Includes custom questions set by Human Resources to collect supplementary information.
Development Goal Planning	Includes development plans you created in the Development Plans screen.

Performance Evaluation Rating Matrix

The header for the **Review Form** contains the **Performance Evaluation Rating Matrix**. You can refer to this to help select the ratings you record for your performance.

> 2020 Year End Performance Review | Manager Review



Amanda Petrussek
 PROC - Project Coordinator, Procurement

Period
 1/1/2020 - 12/31/2020

Due Date
 12/31/2020

Year-end Appraisal to discuss results and evaluate performance. It should be a re-cap of the manager/supervisor feedback opportunities are identified and connected to performance gaps, performance enhancements, skill development or key aspects.

Performance Evaluation Rating			
Does Not Meet Expectations (DNME)	Partially Meets Expectations or Developing Towards Expectations (PME)	Consistently Meets Expectations (ME)	Continually and Consistently Performs Above Expectations (AE)
<ul style="list-style-type: none"> Expected behaviours are seldomly demonstrated; SMART objectives were not set or were not met; Fails to meet the criteria of the job; Falls short of performance targets; Provides inadequate support for the mission, vision or strategic objectives of the organization; Performs below the beginner or developmental stage of demonstrable knowledge, skills and abilities; Exhibits deficient work and competencies. 	<ul style="list-style-type: none"> Developmental opportunity to consistently demonstrate desired behaviours; Delivers on some but not all established SMART objectives; Requires improvement to fully meet performance targets; Provides basic support to the mission, vision or strategic objectives of the organization; Developmental stage of demonstrable knowledge, skills and abilities; Exhibits some but not all competencies and work; Requires guidance and training to improve performance. 	<ul style="list-style-type: none"> Expected behaviours demonstrated consistently; Consistently meets established SMART objectives; Achieves results at a level that meets performance targets; Demonstrates commendable support to the mission, vision or strategic objectives of the organization; Demonstrates fully proficient knowledge, skills and abilities, required work, and competencies. 	<ul style="list-style-type: none"> Mastered behaviours, viewed as a role model; Exceeds in delivering on the established SMART objectives; Sustains consistent exemplary performance throughout the review period; Provides excellent service in support of the mission, vision or strategic objectives of the organization; Consistently exceeds and sometimes far exceeding the criteria of the job; Consistently demonstrates initiative for the benefit of the organization, their division and business unit; Demonstrates full mastery of knowledge, skills and abilities, required work and competencies.

Goals/Objective Evaluation – Year-end

As part of the Performance Review cycle for **Year-end**, in addition to comments, you also need to provide ratings on how you are progressing on your **Goals/Objectives**.

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.
Note: comments entered can be viewed by your manager.
2. Record a rating for performance by clicking the slider to move the sliding scale to the rating you feel is reflective of your performance for each objective.
3. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other Goals/objectives.
4. To save, click **Save as Draft**.
5. Click arrow at top left corner of screen to exit **Review Form**.

TRCA Year End Review -- 2020 | Self Review

0 out of 13 Items reviewed

Janet Tait
ERM - Project Manager, Erosion Risk Management

Period: 1/1/2020 - 12/31/2020
Due Date: 12/31/2020
Janet Tait's Avg. Rating: NOT RATED

Section 1: Objective Evaluation
Janet's Avg. Rating: NOT RATED

Employee and manager meet to establish objective setting for current year which includes alignment to TRCA's strategic and divisional objectives, job requirements, competencies and

1. Increase Training for Employees
Due Date: 12/31/2020
% Complete: 50%

Descriptive information about goal / objective.
The description should follow the SMART method.

S - specific
M - measurable
A - attainable
R - realistic
T - time-based

Rating
Not Rated

Comments

2. Improve Department Process
Due Date: 12/31/2020
% Complete: 0%

Descriptive information about goal / objective.

Rating

Print Save as Draft Preview Cancel

Competency Evaluation – Year-end

As part of the Performance Review cycle for **Year-end**, in addition to comments, you are also required to provide ratings on how you are progressing on your **Competencies**.

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.
Note: comments entered can be viewed by your manager.
2. Record a rating for performance by clicking the slider to move the sliding scale to the rating you feel is reflective of your performance for each objective.
3. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other Competencies.
4. To save, click **Save as Draft**.
5. Click arrow at top left corner of screen to exit **Review Form**.

Training Site (57.3) Performance

TRCA Year End Review -- 2020 | Self Review

0 out of 13 Items reviewed

Janet Tait
ERM - Project Manager, Erosion Risk Management

Period: 1/1/2020 - 12/31/2020
Due Date: 12/31/2020
Janet Tait's Avg. Rating: NOT RATED

Section 2: Competency Evaluation
Janet's Avg. Rating: NOT RATED

This section is used to evaluate demonstration of TRCA's required competencies. [... view more](#)

1. Integrity

Upholding a high standard of fairness and ethics in everyday words and actions. People who display this competency conscientiously and reliably behave in an ethical and honest manner in their dealings with management, peers, direct reports and customers. They are fair in their expectations of others and behave toward others with equal fairness. [... view less](#)

- Is fair in his/her expectations of others.
- Is worthy of the personal trust of others.

Rating
Not Rated

Comments

Behaviors

Effectively working and collaborating with others toward a common goal. People who are competent at collaboration and teamwork build and maintain cooperative work relationships with others. They complete their [... view more](#)

Print Save as Draft Preview Cancel

Career and Development Planning

As part of the Performance Review cycle for **Year-end** you are need to add comments to the questions posed in the Career section.

The questions can be answered in different ways: Yes/No answers and an explanation should be provided to add context to your response.

The screenshot shows the 'TRCA Year End Review -- 2020 | Self Review' interface. At the top, it identifies the user as Janet Tait, ERM - Project Manager, Erosion Risk Management, with a period of 1/1/2020 - 12/31/2020 and a due date of 12/31/2020. Janet Tait's average rating is listed as 'NOT RATED'. The section is titled 'Section 3 Career and Development Planning'. A blue box explains that career discussions support the creation of development goals and aid in organizational workforce planning. Two questions are visible, each with a red-bordered text area for the answer:

- Question 1: 'I am satisfied with continuing to develop within the current position'. The answer field is empty.
- Question 2: 'I am interested in other opportunities in my current career path.'. The answer field is empty.

Below these questions is 'Section 4 Development Plans' with an 'Add' button. A blue box explains that development goals are based on gaps and opportunities identified through the performance cycle. At the bottom, there are buttons for 'Print', 'Save as Draft', 'Preview', and 'Cancel'.

To record your comments in the form:

1. Click on the **Comments** field to add your comments.
Note: comments entered can be viewed by your manager.
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other Career questions.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit **Review Form**.

Development Goal Planning

As part of the Performance Review cycle for **Year-end** you and your supervisors are to identify 2-3 development goals to focus on in the upcoming performance year. Development goals are a tool to aid employees in career and professional development with the primary purpose of improving employee job performance. Remember these need to be SMART goals.

TRCA Year End Performance Review - 2020 | Self Review

0 out of 11 Items reviewed

Janet Tait
ERM - Project Manager, Erosion Risk Management

Period: 1/1/2020 - 12/31/2020
Due Date: 12/31/2020
Janet Tait's Avg. Rating: NOT RATED

I am satisfied with continuing to develop within the current position.

Answer

I am interested in other opportunities in my current career path.

Answer

Section 4: Development Plan

	Due Date	Activities	% Complete
1. Leadership Development	12/31/2020	0 / 1	0%

Improve skills and competencies for desired promotion to Manager role.

Comments

Print Save as Draft Preview Cancel

To record your comments in the form:

1. Click on the **Comments** field to add your comments.
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other **Development Plans**.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit **Review Form**.

Approval/Signature Process

The signature of the completed PDP is similar to the mid-year, where once your supervisor has completed their comments and ratings, the PDP will be sent to you for signature. The only difference with year-end is that Human Resources is required to approve the PDP once the supervisor has finalized prior to the sign-off step.

To complete the sign-off of the PDP you:

1. Open the Year-end Review form.
2. Click **Preview**:

The screenshot displays the 'TRCA Year End Performance Review - 2020' form. At the top, it shows the user's profile: Janet Tait, ERM - Project Manager, Erosion Risk Management. The review period is 1/1/2020 - 12/31/2020, and the due date is 12/31/2020. Janet Tait's average rating is 'NOT RATED'. The form contains two self-review questions with text input fields and rich text editors. The first question is 'I am satisfied with continuing to develop within the current position.' and the second is 'I am interested in other opportunities in my current career path.' Below these is 'Section 4: Development Plan' which includes a sub-section '1. Leadership Development' with a goal 'Improve skills and competencies for desired promotion to Manager role.' and a 'Comments' field. The 'Preview' button is highlighted with a red box.

Due Date	Activities	% Complete
12/31/2020	0 / 1	0%

3. Click **Submit**:

The screenshot shows a performance evaluation form for Amanda. It is divided into two sections:

- Section 1 - Objective Evaluation**:
 - 1. Procurement Database**: Rating is "PARTIALLY MEETS EXPECTATIONS (PME)". Comments state: "The procurement database project was partially completed. Here are the steps I took to achieve the positive outcome of the project:"
 - 2. Information Management Framework**: Rating is "MEETS EXPECTATIONS (ME)". Comments include:
 - I was able to implement a new and more efficient information management framework at TRCA:
 - Liaised with City of Toronto key contacts to understand framework, key processes and data points required for implementation
 - Collaborated with Procurement manager and presented project action plan highlighting action items, key owners, timelines and possible roadblocks and risks
 - Action plan was socialized with internal key stakeholders (i.e. ITRIM, Risk) to ensure that their key processes were captured and properly documented
- Section 2 - Competency Evaluation**: Rating is "MEETS EXPECTATIONS (ME)".

At the bottom right, there is a blue "Submit" button and a grey "Cancel" button. The "Submit" button is highlighted with a red box.

4. The status of your Year-end review changes from **Self-Review** to **Manager Review**:

2020 Year End Performance Review	Due in 74 day(s)	Status Manager Review
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5. Once your manager has reviewed and submitted – the status of the form changes to **Pending Approval**:

2020 Year End Performance Review	N/A	Status Pending Approval
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6. Once that has been completed – the forms review will change to **Employee Signature**. At this point you will be required to provide your sign-off:
 - a. Access and display the Review Form. Scroll to the bottom.
 - b. Check the '**I Agree**' box.
 - c. Enter any comments.
 - d. Click **Complete Review**.

The screenshot shows a web application interface for a performance review. At the top, a header bar indicates 'Test Site (57.4)' and 'Performance'. Below this, the main title is '2020 Mid-year Performance Review' with a sub-tab 'Employee Signature'. The user profile for 'Janet Tait' is shown, with her role as 'CRM - Project Manager, Erosion Risk Management', the review period '1/1/2020 - 6/30/2020', and the due date '6/30/2020'. The review content includes a section for '8. Develop & Lead Talent' with a description and a list of behaviors. Below this are two text input fields for 'Janet's Comments'. At the bottom, there is a 'Signature' section with a red box highlighting the 'I Agree' checkbox and a large text area for 'Janet Tait's Comments'. A red box also highlights the 'Complete Review' button at the bottom right of the form.

7. The Review form status now changes to **Manager Signature**. Once your manager approves sign-off, the process is complete.