

## Performance Development Program (PDP): Year-End Review

The purposes of the Performance Development Program (PDP) is to promote communication, ongoing and frequent open dialogue, and provide feedback about job performance. The PDP process provides employees and supervisors with clear alignment to TRCA's Strategic Priorities and Divisional Priorities, ensuring that everyone is working towards common goals and insight into how they contribute to the organizational strategic plan. The PDP process sets out clear expectations that are specific, measurable and attainable. The PDP program provides employees with the continuous feedback on performance and supports employee career and performance development.

The Year-End Review is intended to provide a mechanism is to focus on achievements and outcomes and identify development opportunities. It provides a platform of feedback to ensure employees and supervisors have clear understanding of accomplishments for the year and growth opportunities to support development and career growth.

### Goals of the Year-End Review Process:

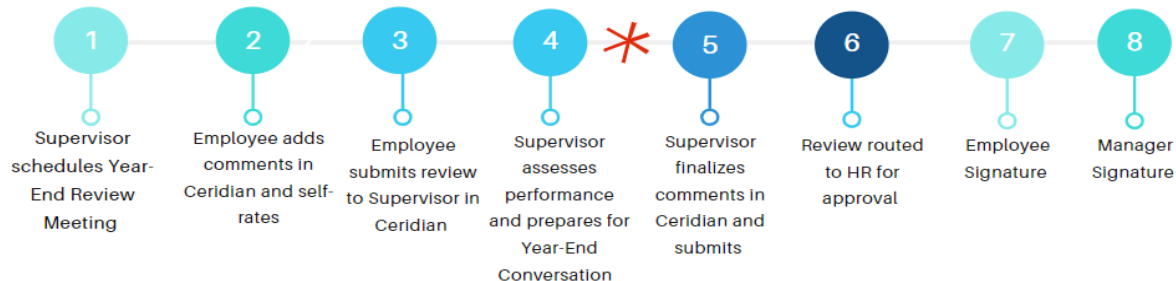
- Learn from past performance to improve the future performance
- Reflect on how you have contributed to TRCA's strategic plan and divisional priorities objectives
- Reflect on how you have demonstrated competencies assigned to your role
- Consider your career goals to support a discussion with your supervisor
- Identify areas of opportunity and development that would make you more effective in your role or career. Consider the various methods available to support attainment of the specific skills or knowledge.
- Clarify the organization's priorities and determine what you must focus on throughout the next year performance year

## Components of the Year-End Review Process

### There are three main components to the Year-End Review:



## OVERVIEW OF THE YEAR-END REVIEW PROCESS IN CERIDIAN



\* Year-End Review Meeting Is held

### Overview of the Year-End Review Process

#### Process steps:

- Supervisor schedules Year-End Review meetings with employees.
- Employee adds comments to their Year-End performance review in Ceridian Dayforce Performance Module related to their objectives progress as well as their competency demonstration in advance of their scheduled Year-End Review. Employees must also complete a self-rating for objectives and competencies.
- Employee submits their Year-End review to you in Ceridian Dayforce Performance Module.
- The status of the Review changes from **Self-Review to Manager Review**.
- Supervisor assess employee's performance, reviews coaching conversation notes from the entire year, reviews the employee's comments in Ceridian Dayforce Performance Module and prepares to hold the performance review meeting.
- Performance review meeting is held between the employee and their supervisor.
- Supervisor calibrates assessment based on review discussion and finalizes comments in Ceridian Dayforce. The information should be reflective of the performance discussion. Supervisor completes rating of objectives and competencies.
- Supervisor submits the Year-End Review.
- The status of the Review changes from **Manager Review to Human Resources (HR) Pending Approval**.
- Upon HR review, the Review is routed to the employee for acknowledgment. The status of the Review changes from **Human Resources Approval to Employee Signature**.
- Once the employee acknowledges the review, it is routed to the employees' supervisor for your acknowledgment. The status of the Review changes from **Employee Signature to Manager Signature**.
- Once completed, you complete the final submission.
- The Year-End Review Process is complete.

## Key Elements of the Year-End Review Process

### **Updating Objectives and Competency Comments:**

Similar to updating your objectives and competencies for your mid-year review, the year-end review culminates in the final year-end review. Employees year-end review comments should be reflective of your achievements to date for each of your objectives and competencies. It is important to ground your comments and achievements with performance examples, you should quantify and qualify your results, outputs and achievements to support the evaluation process.

Here are some tips to support your updates to each of your assigned objectives and competencies:

- For each objective, describe your accomplishments. Questions to address include:
  - What exactly was the work involved in the objective?
  - How was success measured?
    - Possibilities include impact, quantity, quality, accuracy, timeliness, budget, customer satisfaction and a combination of these or other measures.
  - What was the impact of your work on your department and the organization?
  - What obstacles did you have to overcome?
- For each assigned competency, describe the behaviours and actions taken in support of the competency. Include measures that support your comments, how frequently you demonstrated the competency, to what accuracy, how consistently you demonstrated the competency, the impact your actions and behaviours had and the importance of the behaviour balanced against the situation.
- Provide specific examples, although words like outstanding, dependable, and creative are positive, they do not always paint a tangible picture. Instead of stating that you “always maintain good customer relations,” cite customer-satisfaction surveys, letters of communication, and the absence of any customer complaints about you.
- Use metrics to communicate a clear picture.
- Use the word “I” to clearly outline your role in the objective or demonstrating a competency.
- Provide relevant information, be factual, specific and concise.
- Explain value, be sure to tie results to organizational and divisional goals.

### **Performance Evaluation (Rating):**

Performance ratings are an important element in being transparent and accountable in support of open and honest feedback and coaching and development. The purpose of both the employee and supervisor completing ratings of objectives and competencies is to foster a discussion on performance. Based on the discussion, evaluations may be adjusted as needed. Ultimately, the final rating will be the responsibility of the supervisor. Final ratings will not be discussed during the initial performance discussion, as reviews and ratings approved by Human Resources before finalization. Once ratings are finalized, your supervisor will share your final rating with you.

### **Performance Evaluation - Self-Rating:**

Performance evaluation is assessed using the Performance Evaluation Rating Matrix provided below. The same Matrix is used by employees to complete their self-rating and supervisors in completing their evaluation. The scale is anchored with definitions of each performance level and complimented with examples of behaviours exhibited when performing at each level in the rating scale. This matrix is used in the assessment of both the objectives and competencies. Employees should be striving towards a rating of *Consistently Meets Expectations*.

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"> <li>Expected behaviours are seldomly demonstrated;</li> <li>SMART objectives were not set or were not met;</li> <li>fails to meet the criteria of the job;</li> <li>falls short of performance targets;</li> <li>provides inadequate support for the mission, vision or strategic objectives of the organization;</li> <li>performs below the beginner or developmental stage of demonstrable knowledge, skills and abilities; and</li> <li>exhibits deficient work and competencies.</li> </ul>	<ul style="list-style-type: none"> <li>Developmental opportunity to consistently demonstrate desired behaviours;</li> <li>delivers on some but not all established SMART objectives;</li> <li>requires improvement to fully meet performance targets;</li> <li>provides basic support to the mission, vision or strategic objectives of the organization;</li> <li>developmental stage of demonstrable knowledge, skills and abilities;</li> <li>exhibits some but not all</li> </ul>	<ul style="list-style-type: none"> <li>Expected behaviours demonstrated consistently;</li> <li>consistently meets established SMART objectives;</li> <li>achieves results at a level that meets performance targets;</li> <li>demonstrates commendable support to the mission, vision or strategic objectives of the organization; and</li> <li>demonstrates fully proficient knowledge, skills and abilities, required work, and competencies.</li> </ul>	<ul style="list-style-type: none"> <li>Mastered behaviours, viewed as a role model;</li> <li>Exceeds in delivering on the established SMART objectives;</li> <li>sustains consistent exemplary performance throughout the review period;</li> <li>provides excellent service in support of the mission, vision or strategic objectives of the organization;</li> <li>consistently exceeds and sometimes far exceeding the criteria of the job;</li> <li>consistently demonstrates initiative for the benefit of the organization, their division and business unit; and</li> <li>demonstrates full mastery of knowledge, skills and abilities</li> </ul>

To help support employees self-rating of competencies, **Appendix A** provides a list of core competencies based on an employee's roles in the organization with expected behaviours associated each one. Evaluation of competencies should be grounded in these behaviours and rated based on the frequency, accuracy, consistency, impact and importance of demonstrating each required competency.

### **Preparing for the Year-End Meeting:**

Listed below are some questions that you can reflect on to help you prepare for your Year-End Review Conversation with your Supervisor:

- How can I get a handle on what I've accomplished? What I haven't accomplished?
- What are my needs for coaching and feedback? How can I communicate these to my supervisor in a way that they will hear it?
- What would I like to do better? (goals and examples of where your performance could have been better)
- What would I like to learn that would support me in doing my job more effectively?
- What resources do I need to accomplish by goals/objectives moving forward?
- Do I have feedback from others (i.e. stakeholders/customers) that I can share with my supervisor?
- What do I like best about my work?
- What is most challenging for me?
- What competencies or skills do I want to develop?
- Where do I want to go from here?

## Conversation Starters

Performance conversations can be difficult; knowing what to say and how to say it can be a challenge. Below are 'conversation starters' to assist you in facilitating and engaging during performance discussions:

- How do you feel my performance has progressed this year?
- How do you feel my performance year went?
- Here are some performance and competency examples to support my ratings, did you have any questions on them?
- Can you provide me with some specific examples of how I can improve on my competencies?
- Can you identify the areas that you think went well this year?
- What areas do you feel I have most improved in? Can you provide examples?
- What areas do you think I should focus on for improvement or where I have opportunity?
- Did others provide feedback into my performance? Are there any recommendations stemming from that?
- What are the areas of growth for me in the coming year?
- For my development goals, what do you think are areas to focus on for next year?
- What opportunities exist to help me reach the next level in my career?
- What are the division/business unit priorities for next year?

## Career & Developmental Planning:

Career discussions should take place during the year-end review in order to ensure alignment with the creation of development goals and in support of workforce planning. In preparation for your year-end meeting with you supervisor, you should come prepared with the below career questions completed with context to support your responses. It is important that you and your supervisor discuss your career plans, areas of interest and aspirations.

- ☐ I am satisfied with continuing to develop within the current position.
- ☐ I am interested in other opportunities in my current career path.
- ☐ I am interested in opportunities outside my current career path.
- ☐ I plan to retire in the next 1 to 2 years.

Through the performance cycle and evaluation, gaps and opportunities are identified both to support employee's development in your current role as well as future career planning development. This is a two-way discussion that is required to take place between you and your supervisor. Collaboratively, you and your supervisor shall establish **two to three** developmental 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 and supporting employees to reach short and long-term career development goals.

When setting developmental goals, the SMART method (specific, measurable, achievable, results orientated and timely) should be utilized and clear actions documented to support the achievement of the goals. Goals should be reviewed throughout the performance year to ensure progress is on track and documented.

When establishing developmental goals consider the vast range of learning, knowledge gaining and capacity building forums available, including:

- ☐ Special projects
- ☐ Stretch assignments
- ☐ Research projects
- ☐ One-on-one coaching or mentoring
- ☐ Peer to peer knowledge sharing
- ☐ Local network groups
- ☐ Working directly with subject matter experts (SME's)
- ☐ Job shadow opportunities
- ☐ Self-directed learning
- ☐ Ted Talks and online learning forums
- ☐ Formal training
- ☐ Professional forums

If you or your supervisor require any support in identifying the best solution to meet the development goal, please contact a member of the Human Resources team [hr@trca.ca](mailto:hr@trca.ca).

Once you and your supervisor have agreed upon developmental goals, they should be updated in your year-end performance review.

## Appendix A – Competency Definitions

### **Integrity**

Upholds a high standard of fairness and ethics in everyday words and actions. Conscientiously and reliably behaves in an ethical and honest manner in dealing with others, both internal and external to the organization. Fair in expectations of others and behaves towards others with equal fairness.

#### **Behaviours associated with this competency:**

- ☐ *Is ethical and honest in all business dealings.*
- ☐ *Is ethical and honest in all dealings with people.*
- ☐ *Is fair in expectations of others.*
- ☐ *Is worthy of the personal trust of others.*
- ☐ *Aligns words and actions.*
- ☐ *Delivers on commitments made and agreed upon deliverables.*

### **Collaboration**

Effectively works with others across the organization and external to the organization toward a common goal. Works with the organizations best interest at the core. Builds and maintains broad cooperative work relationships with others without silos. Understands and leverages the different styles and perspectives of others to achieve high functioning team dynamics. Completes tasks for group projects in a timely and responsible manner and directly contributes to reaching group goals.

#### **Behaviours associated with this competency:**

- ☐ *Builds and maintains cooperative work relationships with others.*
- ☐ *Openly shares relevant and important information with appropriate individuals to assist in achievement of common goals.*
- ☐ *Listens to and values the input of others.*
- ☐ *Collaborates effectively in meetings and informal interactions.*
- ☐ *Commits to supporting the larger group effort.*
- ☐ *Assists others in the completion of their tasks to support group goals.*
- ☐ *Facilitates collaboration across teams to support organizations broader objectives.*
- ☐ *When conflict arises in team dynamics, facilitates dialogue to assist individuals to arrive at a mutually agreeable win-win solution.*

### **Accountability**

Maintains a high level of commitment to personally getting things done and taking responsibility for actions, behaviours and results. Assumes personal responsibility for effectively achieving outcomes. Honours work commitments by ensuring actions are consistent with words. Demonstrates responsible personal and professional conduct when holding self and others accountable.

#### **Behaviours associated with this competency:**

- ☐ *Complies with established control systems (i.e. Code of Conduct, policies and procedures) to achieve high quality and cost-effective results.*
- ☐ *Holds self-accountable to a high standard and will do what is right despite personal consequences.*
- ☐ *Delivers what has been promised.*
- ☐ *Assumes personal responsibility for achieving outcomes.*
- ☐ *Is dependable and responsible.*
- ☐ *Persists through challenges and finishes what has been started for the betterment of TRCA.*
- ☐ *Works on the 'right' tasks, those linked to the strategic or divisional priorities.*
- ☐ *Produces a high level of work output.*
- ☐ *Is transparent about errors and omissions.*



## **Respect**

Understands, accepts and is sensitive to individual differences. Treat people with respect and equally, regardless of gender, race, creed, place of origin, status, or level of position. Values others for their abilities, qualities and achievements and the contributions brought to the organization. Is open and accepting of the richness of differences among people. Treats others fairly and with dignity.

### **Behaviours associated with this competency:**

- ☐ *Respects all people, regardless of race, gender, status, place of origin or other source of difference.*
- ☐ *Is open and curious to learn about differences among people.*
- ☐ *Treats people with courtesy, politeness, and kindness.*
- ☐ *Emphasizes the things that all people hold in common rather than focusing on differences.*
- ☐ *Promotes respect for differences among people and encourages tolerance and openness.*
- ☐ *Evaluates people based on objective merit rather than subjective bias.*
- ☐ *Is mindful of body language, tone of voice, demeanor and expression in all interactions.*

## **Excellence**

Promotes and maintains high standards of quality at work; anticipates customer/stakeholder needs and designs, promotes or supports the delivery of products and services that exceed customer expectations. Expands depth and breadth of knowledge, skills and experience in areas of expertise.

Produces high quality work and encourages others to do so. Applies discipline and a detail orientation to work activities; continuously seeks ways to improve quality of products or services. Takes personal accountability for providing comprehensive and accurate service and advice to individuals both internal and external to TRCA.

### *Behaviours associated with this competency:*

- ☐ *Listens to and values customer/stakeholder needs, suggestions and feedback; anticipates customer/stakeholder requirements.*
- ☐ *Develops or customizes products and services to better meet the needs of customers/stakeholders.*
- ☐ *Is disciplined and diligent and always attempts to do the best job possible.*
- ☐ *Consistently produces high quality work; encourages other to work at a high standard of quality.*
- ☐ *Demonstrates and shares expert knowledge and capabilities in all situations.*
- ☐ *Provides sound guidance and advice in area of expertise.*
- ☐ *Continually seeks to remain current or upgrade knowledge and skills; capitalizes on continuous learning opportunities to expand knowledge and skill.*
- ☐ *Actively seeks out the current and emerging business and industry trends and best practices to provide sound solutions and advice.*

## **Leadership Competencies:**

### **Develop & Lead Talent**

Directs and leads others to accomplish organizational goals and objectives. Manages development and performance, provides constructive and respectful feedback to encourage and enable performance excellence. Leads by example, sets clear and achievable goals. Fosters an environment that inspires and motivates others and that is respectful and trusting. Exemplifies professionalism and establishes an environment that promotes expression of diverse perspectives and fosters cooperation and collaboration between others.

### **Behaviours associated with this competency:**

- ☐ *Models expected behavior and remains consistent with words and actions.*
- ☐ *Exemplifies ethical practices, professionalism and personal integrity.*
- ☐ *Demonstrates a sincere interest in the development and success of others.*
- ☐ *Takes the time to identify individuals' strengths and development opportunities, provides honest*



- and sound feedback and coaches individuals to perform at their highest levels.*
- ☐ *Sets clear expectations, coaches, monitors and evaluates performance.*
- ☐ *Invests time and resources to support continuous learning.*
- ☐ *Engages employees to gather ideas and input to build cohesive teams.*
- ☐ *Sets challenging expectations for self and sets high but achievable expectations for others.*

## **Champions Change**

Proactively supports, leads and implements change initiatives effectively cross functionally and external to the organization. Leads change efforts through consistency in words as well as actions. Supports those affected by the change and takes personal responsibility to ensure the changes are successfully implemented. Is adaptable to changing situations and adjusts priorities as changes occur within the business and organization. Is agile and flexible in changing circumstances and remains open to shifting ways of doing business.

### **Behaviours associated with this competency:**

- ☐ *Readily adapts and adjusts to new or changing circumstances; modelling change adaptation.*
- ☐ *Supports others through the adoption of change.*
- ☐ *Accepts change openly and willingly.*
- ☐ *Continuously seeks opportunities to improve efficiencies and effectiveness by adopting new methods, processes, etc.*
- ☐ *Is willing to repeatedly change course or change priorities to meet business objectives.*
- ☐ *Anticipates the need for change.*
- ☐ *Actively promotes change initiatives in group and/or organization wide.*

- *Assumes personal responsibility to see that necessary changes are adopted and effectively implemented.*

### **Communicates Effectively**

Drives clarity and understanding through consistent, clear and transparent messaging. Adjusts style, delivery and communication medium based on the situation, audience, needs and objectives. Utilizes active listening to gain insight and comprehension and facilitate common understanding. Messages decisions, opportunities and issues in a clear, concise, logical and timely manner. Encourages and facilitates open discussion through the building of trust and conveying of strategic intent. Consistently aligns actions with values and intentions for powerful communication.

#### **Behaviours associated with this competency:**

- *Attends to verbal and non-verbal cues that create a deeper understanding of communications.*
- *Ensures messages are clear and concise using precise language that accurately reflects and expresses what needs to be conveyed and achieved through the communication.*
- *Ensures words and actions are aligned congruently.*
- *Adapts communication style, both written and verbally, for simple and complex issues, to enhance understanding for a range of audiences.*
- *Engages in actively listening, allowing others to speak without unnecessarily interrupting.*
- *Asks clarifying questions that elicit clearer or more detailed information and confirms understanding to make informed decisions.*
- *Builds trust and fosters accountability through transparent, clear and concise communications.*
- *Takes perspective into account when communicating; recognizing one's positions, motivations and needs and the related filters we listen through.*
- *Demonstrates a strong presence and appropriate tone when communicating in large forums often in pressure situations.*

## **Senior Leadership Competencies:**

### **Create Vision and Strategy**

Leads and defines the future and charts a path forward to optimizing TRCA success. Utilizes vision to guide strategy and strategy to define action. Capitalizes on depth and breadth of knowledge to build on diverse ideas and perspectives and create consensus around vision. Skilled at understanding and communicating context of strategy and vision, holistically factoring in the economic, social and political environment.

#### **Behaviours associated with this competency:**

- *Communicates vision, strategies and priorities with clarity and conviction and sets clear expectations and deliverables to ensure the success of the organization.*
- *Frames emerging issues and provides advice that reflects a thorough and holistic understanding of the environment, implications and impact.*
- *Considers the impact of the economic, social and political environment on organizational and divisional priorities.*
- *Engages others to develop clear, concise and viable strategies for implementation in support of the organization.*
- *Effectively work across boundaries and organizational divisions.*
- *Contributes expertise and insight to the development of organizational strategic priorities, divisional plans and the overarching operations.*

## **Impact and Influence**

Utilizes influence, credibility and a compelling position to aid others in adopting a specific course of action. Takes a variety of actions to influence others to address issues or concerns. Influences others without being excessively aggressive or pushy. Establishes a sound understanding of organizational awareness and audience and modifies methods of impact and persuasion accordingly. Builds strong partnerships, is confident and communicates effectively.

### **Behaviours associated with this competency:**

- ☐ *Establishes ideas, points of view or desired outcomes that others need to adopt.*
- ☐ *Is a decisive decision maker.*
- ☐ *Does background work and develops information necessary to support one's position.*
- ☐ *Attempts to understand one's audience and adapts message to fit the audience.*
- ☐ *Identifies those issues most important and persists on these until objectives are met.*
- ☐ *Understands key stakeholder impacts and interests, taking them into consideration when forming positions.*
- ☐ *Has the courage and strength of purpose to utilize persuasion where appropriate.*
- ☐ *Expresses opinions confidently and persuasively; instills confidence in their abilities through the eyes of others.*

## **Drives Achievement and Innovation**

Possess a drive to pursue greater opportunities and challenges. Leads teams to develop innovative projects and programs in support of organizational excellence. With a strong acuity for fiscal accountability, incorporates financial awareness in all actions. Results focused with an unwavering enthusiasm for driving TRCA success.

### **Behaviours associated with this competency:**

- ☐ *Capitalizes on both formal channels and informal networks to achieve goals. Forms alliances with key stakeholders to achieve objectives.*
- ☐ *Drives self and team to exceed a standard of excellence, looks for ways to learn how to do things more effectively and sets challenging goals and takes calculated risks.*
- ☐ *Views old problems in new ways and has innovative approaches to solving those problems.*
- ☐ *Connects seemingly unrelated ideas, events, and circumstances to find global solutions to individual problems, ensuring fiscal responsibility in the process.*
- ☐ *Possess the tenacity to attain objectives despite obstacles and setbacks.*
- ☐ *Fosters an environment where employees see opportunities for creative problem solving while staying within the parameters of sound practice.*
- ☐ *Thinks in terms of desired outcomes and holistically across the organization, not just reactively with quick solutions. Finds ways to turn the ideal into reality.*
- ☐ *Encourages new ideas, methodologies, and procedures in support of innovation.*