



Toronto and Region Conservation Authority (TRCA)

Supervisor 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/Objectives that your employee created in the Goals screen.
Competency Evaluation	Includes the Competencies that are assigned to your employees in the Competency screen.
Career and Development Planning	Includes custom questions set by the Human Resources to collect supplementary information.
Development Goal Planning	Includes Development Goals that your employee created in the Development Goals screen.

Performance Evaluation Rating Matrix

The header for the **Review Form** contains the **Performance Evaluation Rating Matrix**. You can refer to the header to help gauge the ratings you record for 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)
- 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.	- 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.	- 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.	- 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 are also required to provide ratings on how your employees are progressing with **Goals/Objectives**.

To record your comments and ratings in the form:

1. Click on the **Comments** field next to your employee's comments to add your comments.

Note: employee comments **cannot** be modified by supervisor.

2. Next to the rating your employee recorded for themselves, record a rating for performance by clicking the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** and **Rating** scales 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 the **Review Form**.

The screenshot displays the 'TRCA Year End Performance Review - 2020 | Self Review' interface. At the top, a navigation bar includes a menu icon, a home icon, and a 'Test Site (57.4) Performance' label. Below this, a sidebar on the left contains a list of icons. The main content area is titled 'John Turnberry' and 'ERM - Environmental Technician, Erosion Risk Management'. It shows a 'Performance Evaluation Rating' of 3 (Meets Expectations) and a 'Comments' field. The 'Comments' field for Phil Walker is highlighted with a red box. The form also includes a 'Sample Goal 1' section with a 'Due Date' of 7/31/2020 and a '% Complete' of 0%.

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 your employees are progressing with **Competencies**.

To record your comments and ratings in the form:

1. Click on the **Comments** field next to your employee's comments to add your comments.
Note: employee comments cannot be modified by supervisor.
2. Next to the rating your employee recorded for themselves, record a rating for performance by clicking the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** and **Rating** scales 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 the **Review Form**.

The screenshot displays the 'TRCA Year End Performance Review - 2020 | Self Review' interface. At the top, a navigation bar shows 'Test Site (57.4) Performance' and '0 out of 10 Items reviewed'. The user profile 'John Turnberry' is visible, along with 'ERM - Environmental Technician, Erosion Risk Management', 'Period: 1/1/2020 - 12/31/2020', 'Due Date: 12/31/2020', 'John Turnberry's Avg. Rating: 3 MEETS EXPECTATIONS (ME)', and 'Phil Walker's Avg. Rating: NOT RATED'.

The form is divided into two main sections:

- 1. Accountability**
Description: 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.
Behaviors: 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.
John's Rating: 3 Meets Expect...
Phil's Rating: Not Rated
Comments: Record details of your performance in this field: For example:
 - I carried out the actions.....
 - My progress / completion includes
 - The impact of the achievement includes.
- 2. Collaboration**
Description: 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.
Behaviors: Builds and maintains cooperative work relationships with others. Openly shares relevant and important information with appropriate individuals to assist in achievement of common goals.
John's Rating: Not Rated
Phil's Rating: Not Rated
Comments: Record details of your performance in this field: For example:
 - I carried out the actions.....
 - My progress / completion includes
 - The impact of the achievement includes.

At the bottom, there are buttons for 'Print', 'Save as Draft', 'Preview', and 'Cancel'.

Career and Development Planning

As part of the Performance Review cycle for **Year End** you are required to provide comments on **Additional Questions** posed to your employees.

The screenshot displays the 'TRCA Year End Performance Review - 2020 | Self Review' interface. At the top, it shows the user's name 'John Turnberry' and his role 'ERM - Environmental Technician, Erosion Risk Management'. The review period is '1/1/2020 - 12/31/2020' with a due date of '12/31/2020'. The ratings section shows 'John's Rating' as '3 Meets Expect...' and 'Phil's Rating' as 'Not Rated'. The 'Comments' section is highlighted with a red box, showing 'John's Answer' and 'Phil's Answer' fields. Below this, the 'Section 3: Additional Questions' is visible, containing two questions with corresponding answer fields for John and Phil. The bottom of the form has buttons for 'Print', 'Save as Draft', 'Preview', and 'Cancel'.

To record your comments in the form:

1. Click on the **Comments** field next to your employee's comments to add your comments.
Note: employee comments cannot be modified by supervisor.
2. Use the scroll bar to navigate to other **Comment** fields to enter additional information for other **Additional Questions**.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Development Goal Planning

As part of the Performance Review cycle for **Year End** you are required to create development objectives collaboratively with your employee. These are captured in the **Development Plan** section on the form.

The screenshot displays the 'TRCA Year End Performance Review - 2020' form. At the top, a navigation bar includes a home icon, a 'Test Site (574)' label, and a 'Performance' tab. Below this, a header section identifies the user as 'John Turnberry' (ERM - Environmental Technician, Erosion Risk Management) and shows the review period from 1/1/2020 to 12/31/2020. It also displays ratings: 'John Turnberry's Avg. Rating: 3 MEETS EXPECTATIONS (ME)' and 'Phil Walker's Avg. Rating: NOT RATED'. The main content area is divided into two columns for 'John's Answer' and 'Phil's Answer'. The first section contains John's statement: 'I feel I can contribute more in my role. I wish to improve my skills by taking a course.' and Phil's response. The second section contains John's statement: 'I am interested in other opportunities in my current career path. I am interested in growing and eventually becoming a manager. I would like to job shadow. I also want the opportunity to be acting manager in m manager's absence.' and Phil's response. Below this is 'Section 4: Development Plan', which includes a table for '1. Leadership Development'. The table has columns for 'Due Date' (12/31/2020), 'Activities' (0 / 1), and '% Complete' (0%). Under the table, there are fields for 'John's Comments' and 'Phil's Comments'. John's comment is: 'I wish to development my communication skills. I am currently enrolled in a course. I am more confident in addressing crowds and chairing large meetings.' The 'Phil's Comments' field is highlighted with a red box and contains a text editor with a 'Not Applicable' checkbox. 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 next to your employee's comments to add your comments.
Note: employee comments cannot be modified by supervisor.
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 the **Review Form**.

Year End Performance Evaluation Form Step and Approval Process

The steps and related approval in the process are as follows:

Year-year Performance Review	1. Self-Review 2. Manager Review 3. Human Resources Approval (Pending Approval) 4. Employee Signature 5. Manager Signature
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You take the same steps for approval of your employee's Performance Evaluation Review Form under **Year End Performance Evaluation** as facilitated for the **Mid-year Performance Evaluation**.

The difference in the process is that **Pending Approval** (i.e., "Human Resources Approval") is slotted in between **Manager Review** and **Employee Signature**.

Approval/Signature Process

1. Once your employee has submitted their review - the status of the review changes to **Manager Review**.
2. Once you have finalized your Year-end comments, submit the review by:
 - a. Open the Year-end Review form
 - b. Click **Preview**:

The screenshot displays the TRCA Year End Performance Review - 2020 Self Review form. The interface includes a sidebar with navigation icons, a header with 'Test Site (57.4) Performance', and a main content area. The main content area features a header for 'John Turnberry' (ERM - Environmental Technician, Erosion Risk Management) with a period of 1/1/2020 - 12/31/2020 and a due date of 12/31/2020. It shows 'John's Answer' and 'Phil's Answer' sections. The 'John's Answer' section contains two text boxes with content about contributing more in the role and interest in other opportunities. The 'Phil's Answer' section is empty. Below these is 'Section 4: Development Plan' with a sub-section '1. Leadership Development' showing a due date of 12/31/2020, 0/1 activities, and 0% completion. It includes 'John's Comments' and 'Phil's Comments' text boxes. At the bottom right, a red box highlights the 'Preview' button.

c. Click **Submit**:

2020 Year End Performance Review | Manager Review

11 out of 11
Items reviewed

Amanda Petrussek

Preview

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

Due Date: 12/31/2020

Linda Martin's Avg. Rating
MEETS EXPECTATIONS (ME)

Section 1 - Objective Evaluation

Amanda's Avg. Rating
MEETS EXPECTATIONS (ME)

Linda's Avg. Rating
MEETS EXPECTATIONS (ME)

1. Procurement Database

Amanda's Rating
MEETS EXPECTATIONS (ME)
Comments
The procurement database project was partially completed. Here are the steps I took to achieve the positive outcome of the project:
a.
b.
c.

Linda's Rating
MEETS EXPECTATIONS (ME)
Comments

2. Information Management Framework

Amanda's Rating
MEETS EXPECTATIONS (ME)
Comments
• I was able to implement a new and more efficient information management framework at TRCA:
• I liaised with City of Toronto key contacts to understand framework.

Linda's Rating
MEETS EXPECTATIONS (ME)
Comments

Print

Submit

Cancel

- Once the review has been submitted, it is routed to Human Resources Approval and the status of the review changes **Pending Approval**.

Amanda Petrussek
PROC - Project Coordinator, Procurement

2020 Year End Performance Review

Pending Approval

Employee Signature and Manager Signature

- After Human Resources approves your employee's Year-end Review Form – it is routed to employee for their acknowledgment. The status of the form will display **Employee Signature**:

2020 Year End Performance Review

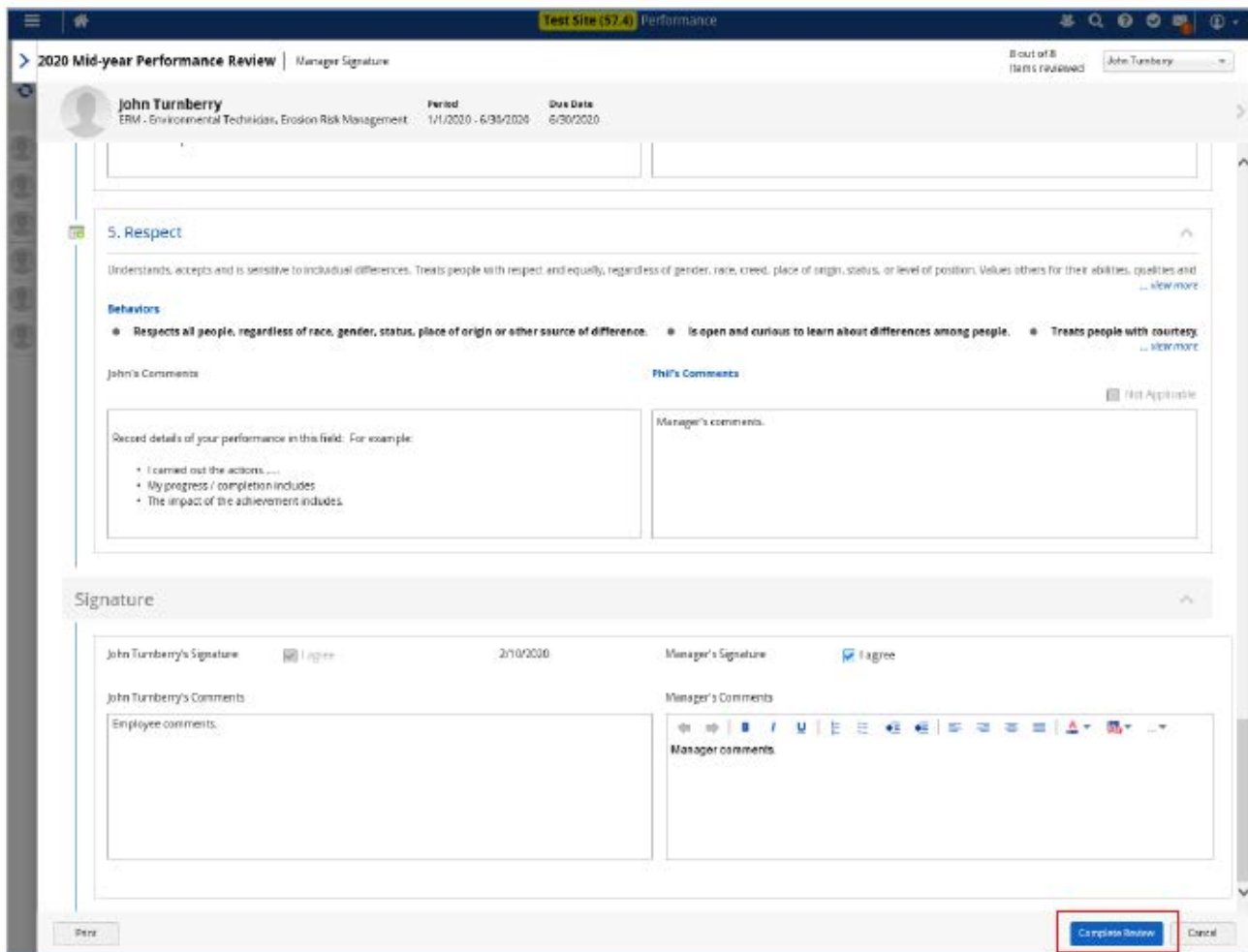
1/1/2020 - 12/31/2020

Employee Signature

- Once your employee has acknowledged the Year-end Review Form – the form is routed to you for acknowledgment. The status of the form will display **Manager Signature**.

 Amanda Petrussek PROC - Project Coordinator, Procurement	2020 Year End Performance Review	 Manager Signature
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- To provide manager acknowledgment:**
 - Open the respective Year-end Review Form.
 - Scroll to the bottom of the Form.
 - Check the '**I Agree**' box.
 - Enter any Comments.
 - Click **Complete Review**.



The screenshot displays the '2020 Mid-year Performance Review' form for John Turnberry. The form is titled '2020 Mid-year Performance Review | Manager Signature'. It shows the employee's name, title, and the review period. The '5. Respect' section is expanded, showing a list of behaviors and checkboxes for 'I Agree'. The 'Manager's Signature' section is highlighted with a red box, showing the 'I Agree' checkbox and a 'Complete Review' button.

- The status of Year-end review Form changes to **Completed**. The Year-end review is now complete:

 Amanda Petrussek PROC - Project Coordinator, Procurement	2020 Year End Performance Review	 Completed
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