



Toronto and Region Conservation Authority (TRCA)

Employee Training Aid – Dayforce Performance

January 2023

Purpose of Employee Training Aid

This training aid will help you understand features of **Dayforce Performance** module that will use as an employee in updating your performance review items for TRCA's Performance process, including:

1. Recording entries to your Performance screens, such as creating for **Goals/Objectives**, and **Development Plans**.
2. Completing you **Review Form**, such as inputting comments and ratings.
3. **Approval Process** for review forms.

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TRCA Performance

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Dayforce Performance

Dayforce Performance is designed to support Toronto and Region Conservation Authority (“TRCA”) in its Performance Development process. It includes features to help employees and managers with:

- Goal/Objective Setting
- Competency Development
- Performance and Career Development Planning

TRCA Performance

TRCA’s Performance Program is based on open and ongoing dialogue, feedback, and support throughout an employee’s career. Key foundational pillars of the program include:

- Operationalizing employee work activities through Goals/Objectives that are aligned to TRCA’s Strategic Pillars and Strategic Outcomes.
- Formalized Competencies to align individual behavior and actions with TRCA’s Core Behaviours.
- Career and Development Planning with the primary purpose of improving employee job performance and supporting employees to reach short and long-term career development goals.

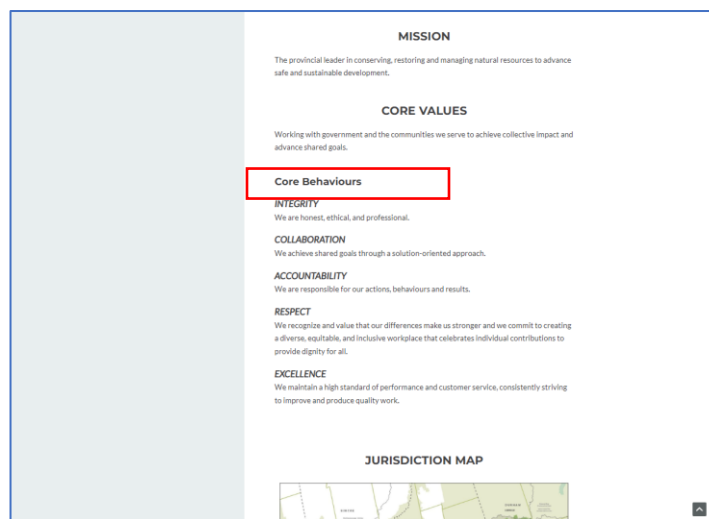
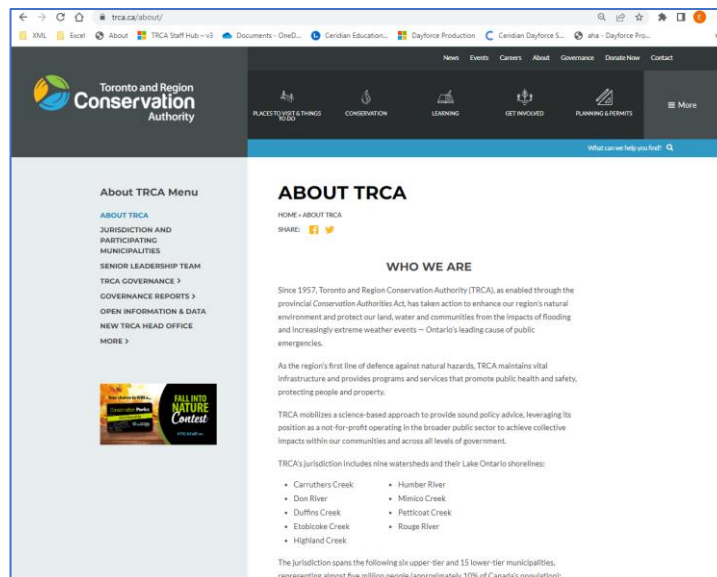
Directional Resources and Related Documents

TRCA's Performance Development Program incorporates elements that are aligned with TRCAs underlying governing mandates and operational objectives.

TRCA Mission, Vision, Core Values and Core Behaviours

Located on TRCA's public website under **About TRCA** webpage, TRCA's Core Behaviours are incorporated in TRCA's Performance Program and translate to competencies expected of all employees.

| | |
|----------|---|
| Link to: | TRCA Mission, Vision, Core Values and Core Behaviours |
|----------|---|

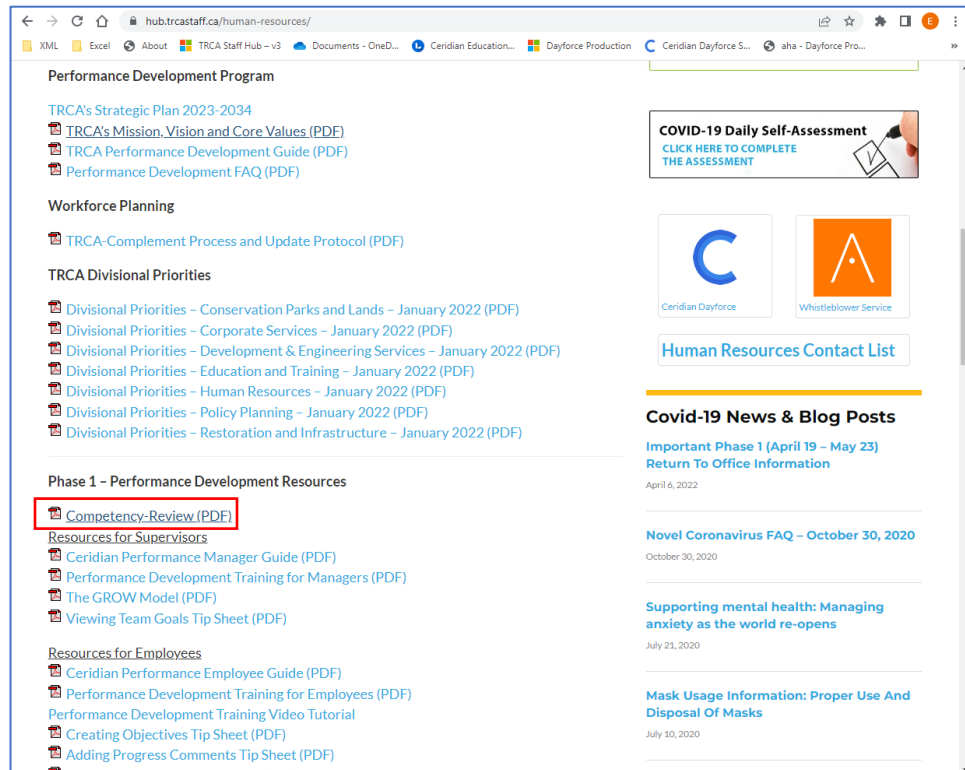


Core Behaviours: Competencies

TRCA's Performance Development Program encompasses formalized Competencies to align individual behavior and actions with TRCA's Core Behaviours.

A detailed outline of Core Behaviours is located on the **Staff Hub** under **Human Resources > Performance Development Resources**.

| | |
|----------|--|
| Link to: | Staff Hub > Human Resources |
|----------|--|



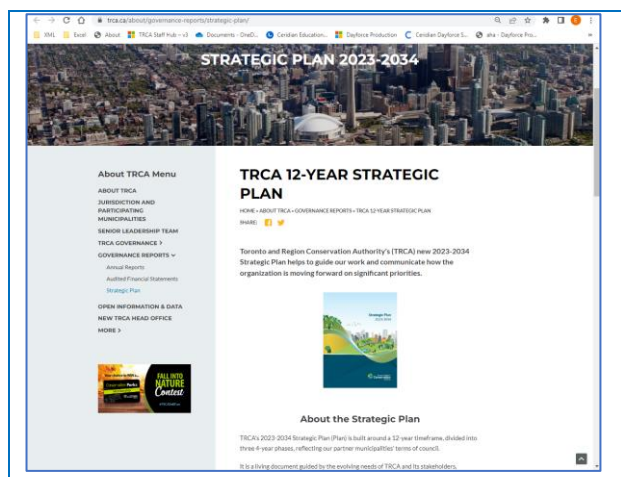
TRCA Strategic Plan 2023-2034 and TRCA Strategic Pillars

Located on TRCA's public website under **About TRCA > Governance Reports** webpage. There is also a link to download a PDF file version of the TRCA 2023-2034 Strategic Plan. The plan is also included on the **Strategic Business Planning and Performance** webpage.

It is a living document that guides TRCA towards its desired outcomes. A new plan starting in 2023, it orients around four strategic pillars and 12 strategic outcomes. The four pillars are included in TRCA's Performance Program as Goal Categories that must be set for every goal recorded. Core Behaviours are also listed in TRCA's Strategic Plan.

A summarized version of The Strategic Pillars and Strategic Outcomes is also included on the **Staff Hub** website under **CEO Update** in a November 2022 update.

| | | |
|----------|---|--|
| Link to: | Strategic Plan 2023-2034 | TRCA Strategic Pillars |
| Link to: | Strategic Business Planning and Performance | |



TRCAstratPlan2023-2034-FA.pdf

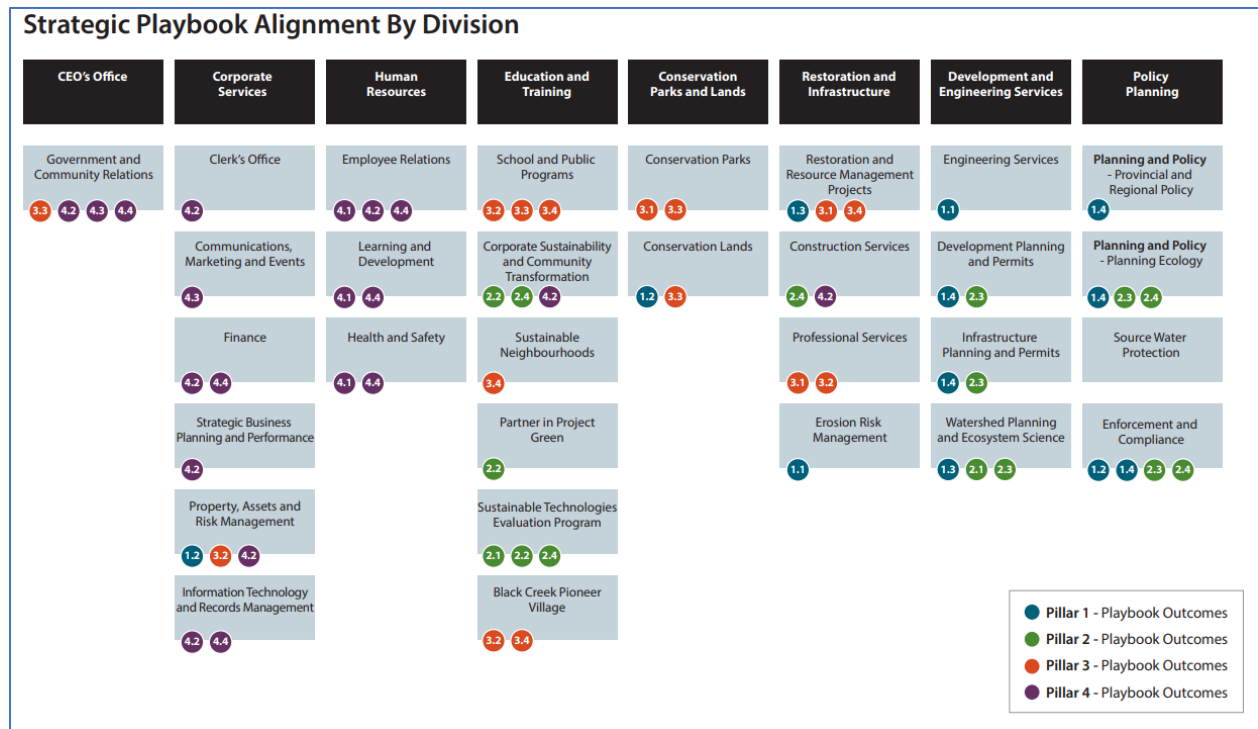
| | |
|-----|---|
| | PILLAR 1 Environmental Protection and Management |
| 1.1 | Deliver provincially mandated services pertaining to natural hazards including flood and erosion |
| 1.2 | Leadership in greenspace conservation |
| 1.3 | Maintain healthy and resilient watershed ecosystems in the face of a changing climate |
| 1.4 | Balance development and growth to protect the natural environment ensuring safe sustainable development |
| | PILLAR 2 Knowledge Economy |
| 2.1 | Research and development that drives innovation and climate-based solutions |
| 2.2 | Collaboration to advance a green transition |
| 2.3 | Advocacy and adaptability in the face of policy pressures |
| 2.4 | Integrate environmental considerations and science into decision making |
| | PILLAR 3 Community Prosperity |
| 3.1 | Connect communities to nature and greenspace |
| 3.2 | A culture of diversity, equity and inclusion contributing to community wellbeing |
| 3.3 | Informed citizens are conservation champions |
| 3.4 | Inspired communities take environmental action |
| | PILLAR 4 Service Excellence |
| 4.1 | A strong and skilled workforce |
| 4.2 | Provide and manage an efficient and adaptable organization |
| 4.3 | Responsive relationships and a trusted brand with a reputation for excellence |
| 4.4 | Transparent decision making and accountable results |

Business Unit Alignment

A Business Unit Alignment Chart that cross references how your division and business unit goals align with the Strategic Plan Pillars and Outcomes.

Located on the Staff Hub website under a January 10, 2023, **CEO Update**.

| | |
|----------|---|
| Link to: | Located on the Staff Hub website under a January 10, 2023, CEO Update webpage. Welcoming 2023 - Business Unit Alignment |
| Link to: | Located on the Strategic Business Planning and Performance webpage. Strategic Business Planning and Performance <ul style="list-style-type: none"> Business Unit Alignment Chart |



Playbook

The Playbook is TRCA's living implementation plan. It operationalizes a 12-year plan into shorter, four-year phases. The Playbook is organized by Pillars and Outcomes and should inform annual business unit planning as well as performance development program objective setting. The Playbook will be updated regularly and is available on the dedicated Staff Hub SBPP hub space page.

| | |
|----------|--|
| Link to: | Located on the Staff Hub website under a January 10, 2023, CEO Update webpage. Welcoming 2023 - Playbook |
| Link to: | Located on the Strategic Business Planning and Performance webpage. Strategic Business Planning and Performance <ul style="list-style-type: none"> Playbook (Excel) |

| Strategic Plan - Outcome Statement | Performance Indicator (12 Year) | Action - Annual Steps to Achieve |
|--|--|---|
| 1.1 Deliver provincially mandated service pertaining to flood and erosion hazards • Conducting all provincially mandated services pertaining to flood, erosion and hazards • Flood Risk Identification, warning, and mitigation • Erosion Inventory & Monitoring • Green Infrastructure & Capital Works Projects • Public Outreach | % of known flood and erosion risks that will be mitigated with active or funded projects | |
| INFO PROVIDED BY (DIVISION/BUSINESS UNIT) PLAYBOOK IMPACT - FIRST TERM - THIS IS WHAT YOU ARE TRYING TO ACHIEVE IN THE FIRST 4 YEARS TARGET - IMPACT METRIC - YOU WILL REPORT ON THIS AT THE END OF THE FIRST TERM Target # for Term 1 (2026) ACTION - ANNUAL STEPS TO ACHIEVE COLUMN "C" | | |
| RI.ERM.AD | Reduce risks to people and property through a well-managed network of erosion control structures | 65% (80% is longer term target) Complete asset management report |
| RI.ERM.AD | Develop erosion risk mapping and screening tools using high-accuracy remote sensing data (LIDAR, photogrammetry, etc.) | 85% Acquire LIDAR or other relevant datasets at a more frequent interval in order to improve erosion risk mapping and accuracy through remote sensing data (LIDAR, photogrammetry, etc.) screening tools |
| DES.ENGINEERING.A.D | Meet industry/regulatory/performance standards and criteria for management of TRCA flood-control infrastructure | 80% Operate and maintain 12 dams according to regulatory standards |
| DES.ENGINEERING.A.D | | Develop dam inspection procedures and tools to conduct rigorous inspections |
| DES.ENGINEERING.A.D | | Train staff to conduct proper inspections of dam structures |
| DES.ENGINEERING.A.D | | Operate and maintain 8 dikes according to regulatory requirements |
| DES.ENGINEERING.A.D | | Develop dike inspection procedures and tools to conduct rigorous inspections |
| DES.ENGINEERING.A.D | | Train staff to conduct proper inspections of dike structures |
| DES.ENGINEERING.A.D | | Operate and maintain 11.5 km of flood control channels according to regulatory requirements |
| DES.ENGINEERING.A.D | | Routine cleaning of debris and sediment from |

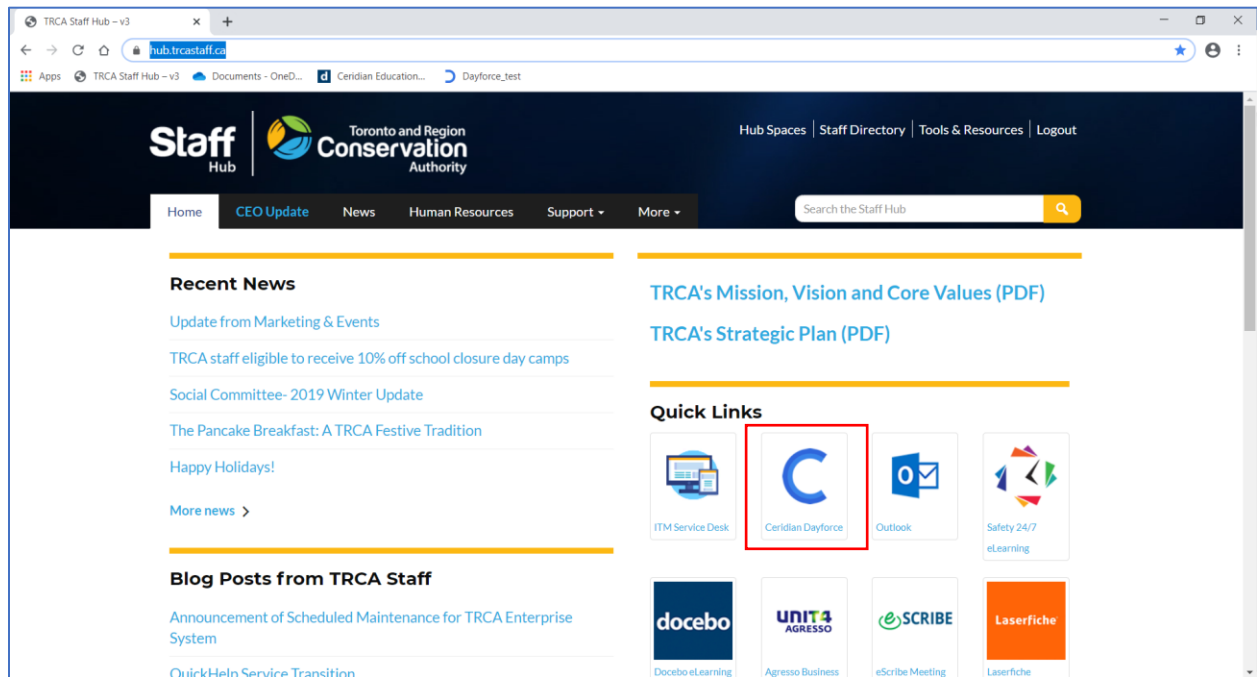
PDF versions of the Paybook specific to your division are also available.

Located on the **Strategic Business Planning and Performance** webpage.

| | |
|----------|---|
| Link to: | <u>Government and Community Services</u> |
| Link to: | <u>Corporate Services</u> |
| Link to: | <u>Human Resources</u> |
| Link to: | <u>Conservation Parks and Lands</u> |
| Link to: | <u>Restoration and Infrastructure</u> |
| Link to: | <u>Development and Engineering Services</u> |
| Link to: | <u>Policy Planning</u> |
| Link to: | <u>Education and Training</u> |

Launching Ceridian Dayforce

You can launch **Dayforce** by clicking on the **Dayforce** link on TRCA's Staff Hub.

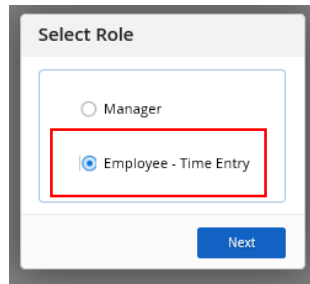


You can also copy and paste the link below into your browser's address bar.

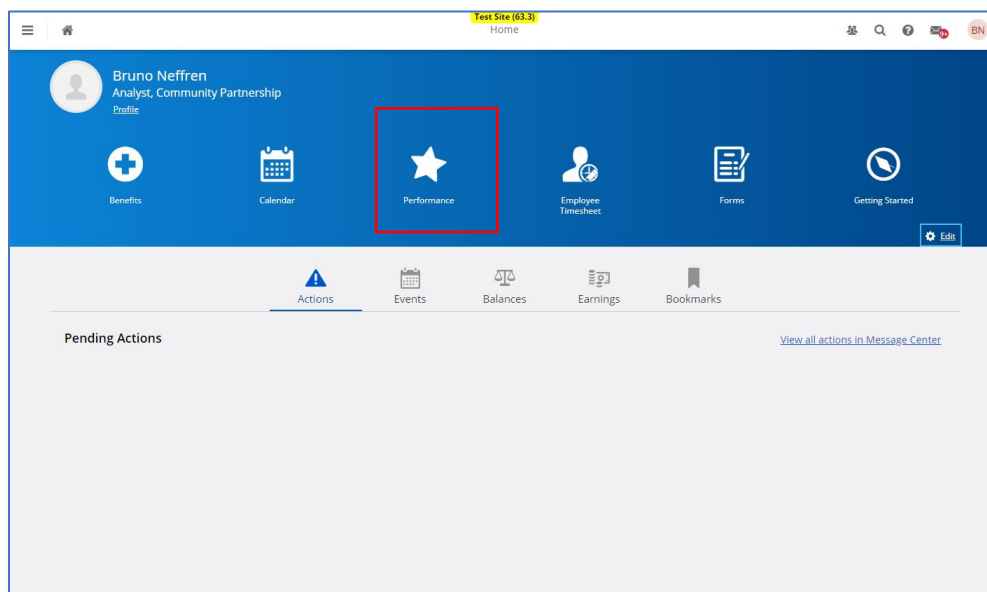
- <http://dayforce.trcastaff.ca/>

Employee – Time Entry Login Role

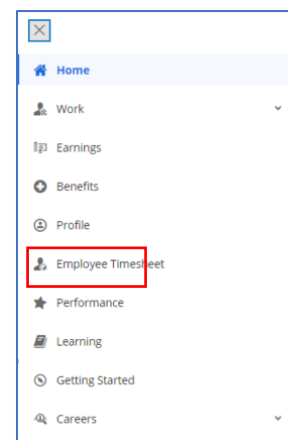
To record and update your personal performance items such as goal/objective details, ratings and performance comments, you log in under the **Employee – Time Entry** role.



Dayforce then opens with the **Home** screen displayed. Click the **Performance** icon on the Home screen to access **Dayforce Performance**.



If the icon is not on your screen, click the Menu button (☰) at the top left-hand corner of the screen and select **Performance** from the menu to access **Dayforce Performance**.



Dayforce Performance Screens

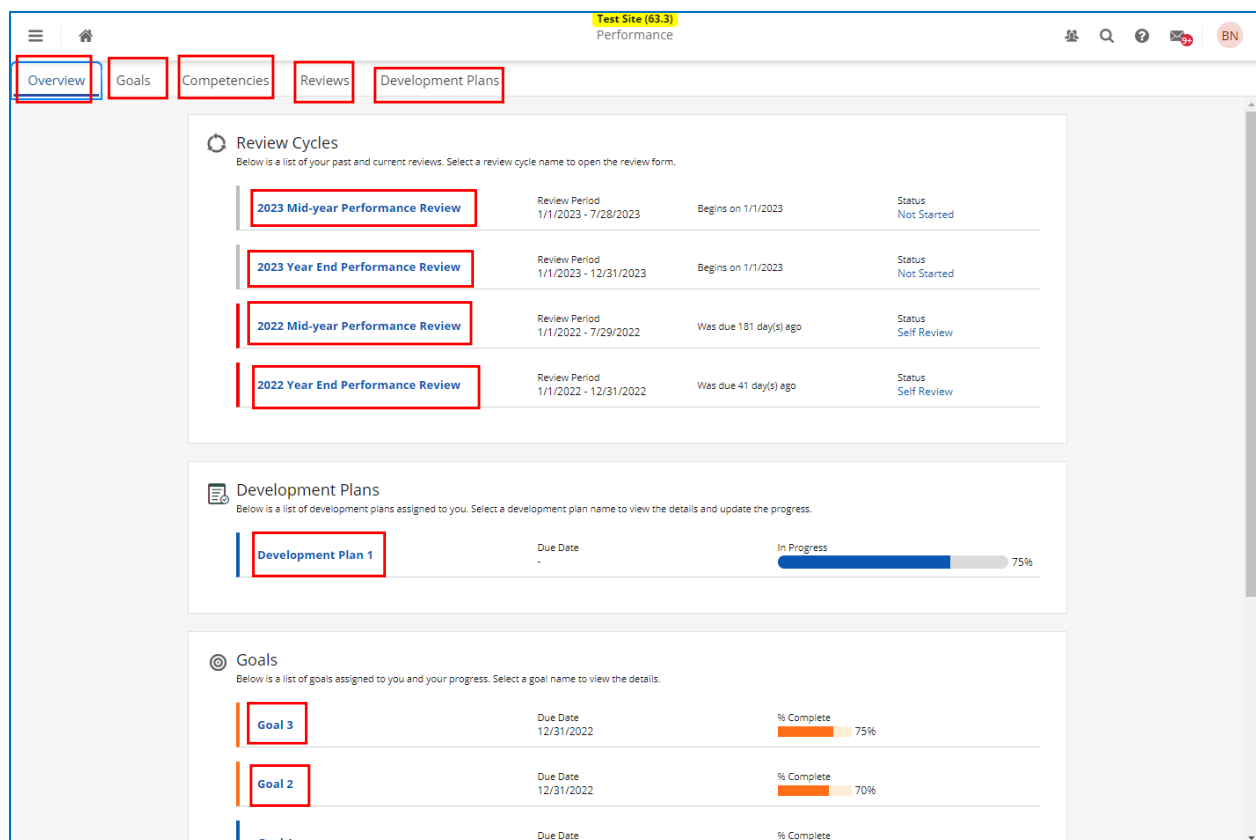
When you access the Dayforce Performance module under your **Employee – Time Entry** user role, the module includes the following screens. Each screen is a tab.

| | |
|--------------------------|---|
| Overview | This screen displays a summary of your Performance items |
| Goals | You record your Goals/Objectives . |
| Competencies | Lists the Competencies that are assigned to you. |
| Reviews | Includes Review forms that are assigned to you. You use these forms to record your comments and ratings. |
| Development Plans | You record Development Plans, for example to track career development and performance improvement. |

Overview Screen

The **Overview** screen is the first screen that displays by default. This screen displays a summary of your **Performance** items. It consists of several panes that summarize your **Review Cycles**, **Goals**, **Competencies** and **Development Plans**.

You can click the **tab** hyperlinks to display the related screens.



You can also click links in the panes to access those specific items in the related screen.

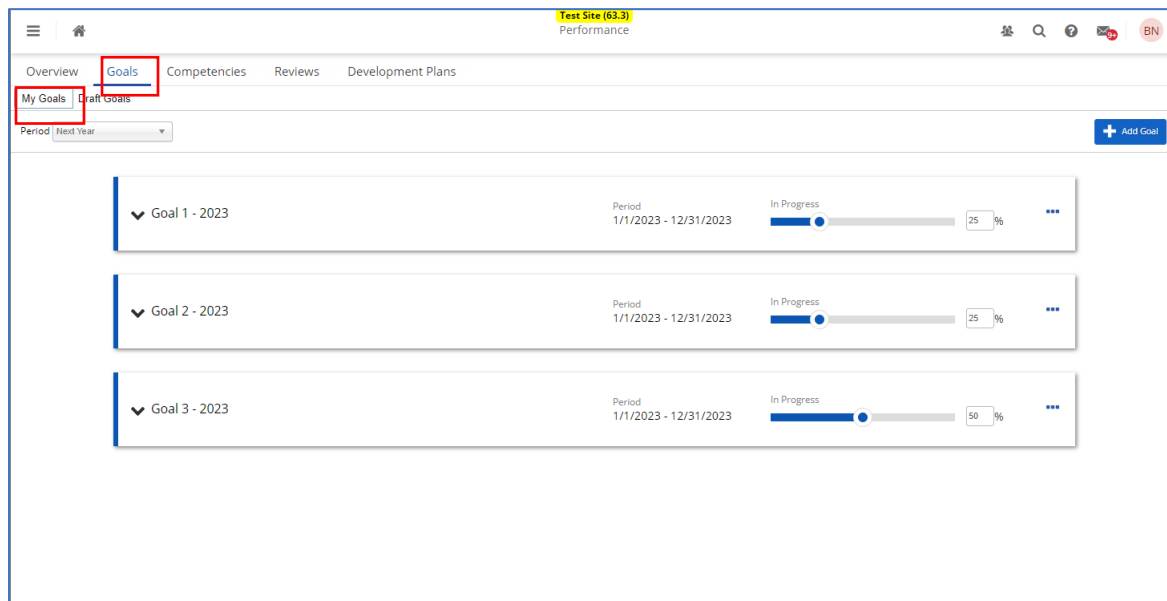
Goals / Objectives

The **Goals** screen is where you record details for your goals / objectives.

To access the **Goals** screen, click on the **Goals** button in the ribbon.

When you access your goals, the **My Goals** screen displays by default to display your published goals.

(Draft Goals are ones that you are “drafting” but haven’t published or shared. This will be explained in a section further below.)



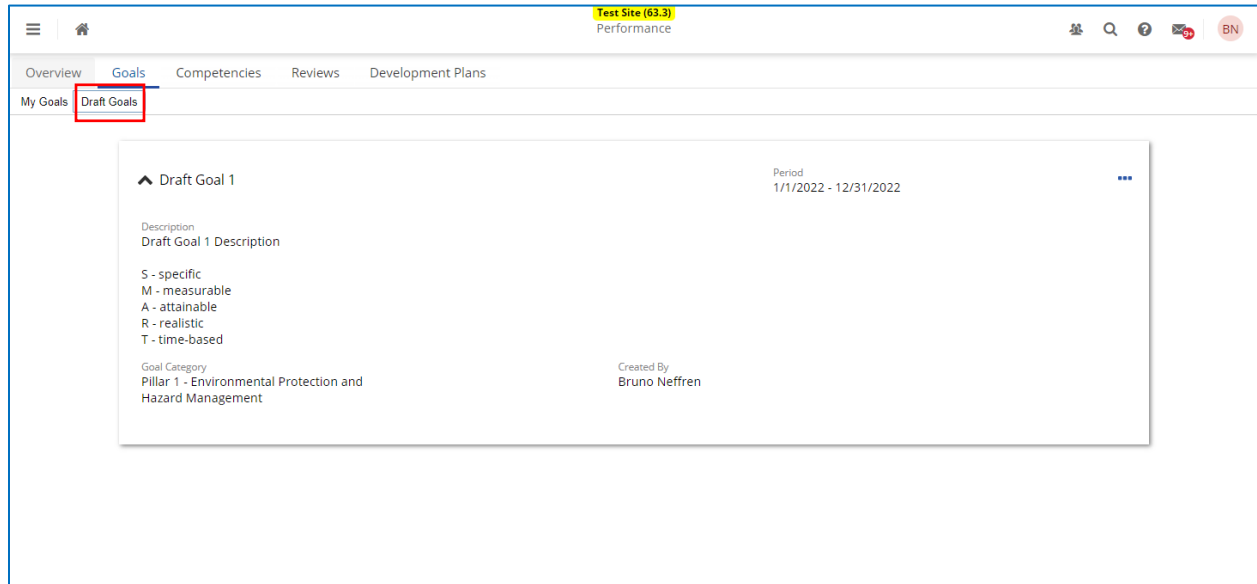
Goals – Period list

You select a value in the **Period** list to filter your goals by year based on the Goal Start Date (i.e., 'Previous Year', 'Current Year', 'Next year', 'Future Periods').



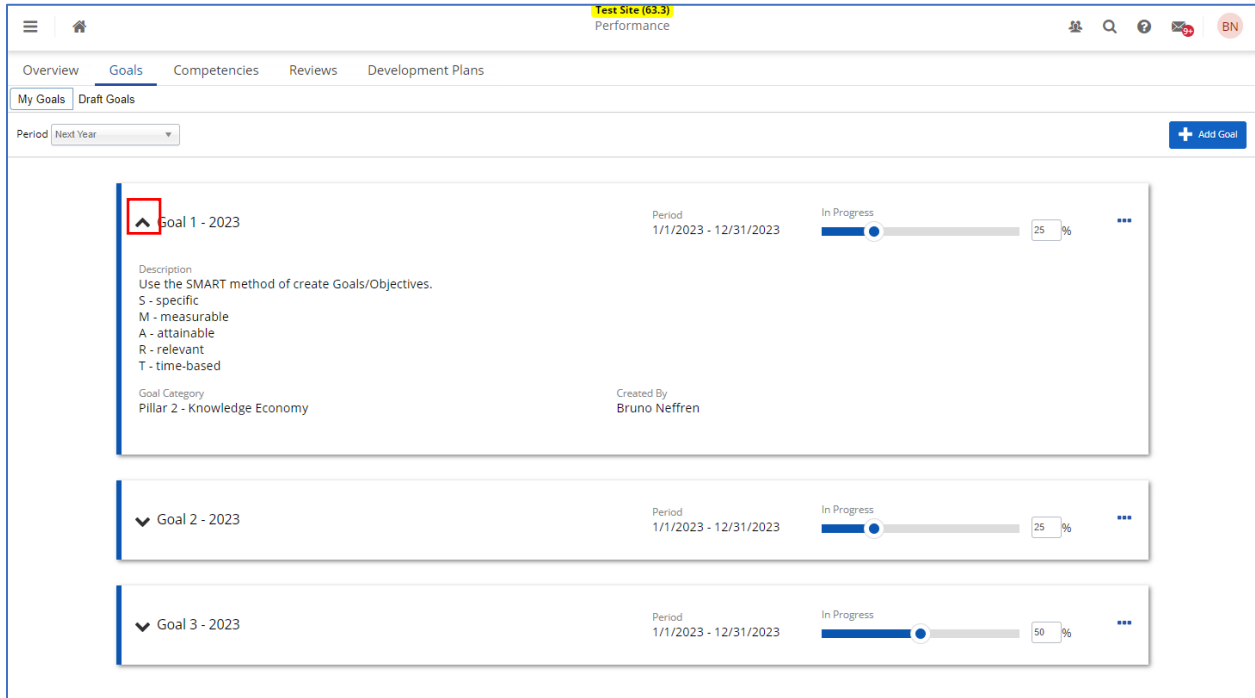
Draft Goals

Draft Goals are ones that you are “drafting” and “Save as Draft” but haven’t published or shared yet. There is a separate screen to track these. Click the **Draft Goals** button to display any you might have. After you publish them, they display in the **My Goals** screen.



Displaying Goal Details

You display details of a goal by clicking the arrow next to the **Name** of the goal.



The screenshot shows the 'Goals' section of the TRCA Performance system. At the top, there's a navigation bar with 'Overview', 'Goals', 'Competencies', 'Reviews', and 'Development Plans'. Below this, there's a 'My Goals' tab and a 'Draft Goals' tab. A 'Period' dropdown is set to 'Next Year'. A '+ Add Goal' button is in the top right.

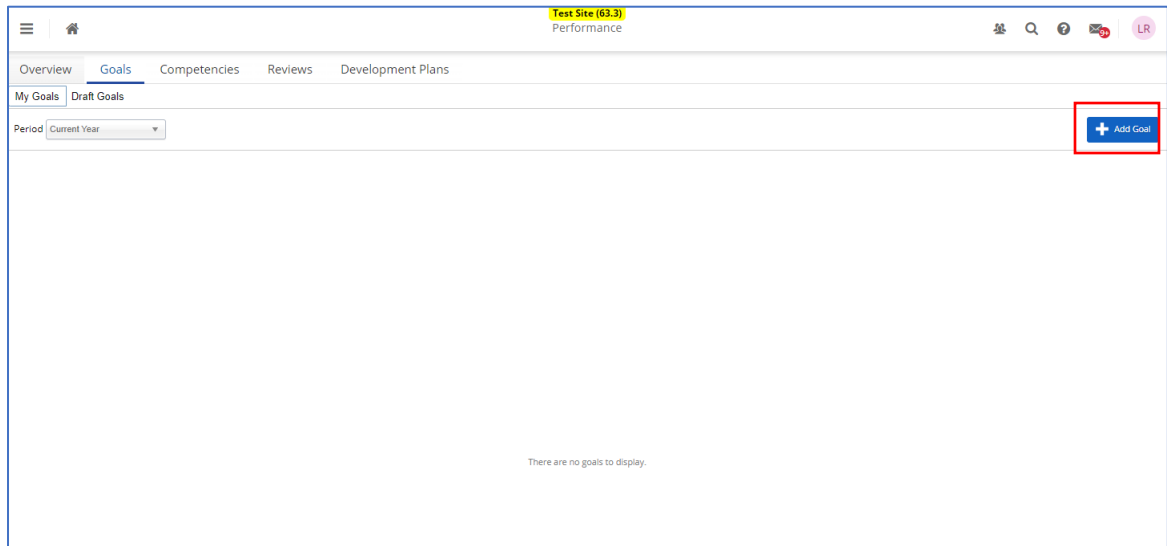
Three goal cards are listed:

- Goal 1 - 2023**: This card is expanded. It shows a description: 'Use the SMART method of create Goals/Objectives. S - specific, M - measurable, A - attainable, R - relevant, T - time-based'. The goal category is 'Pillar 2 - Knowledge Economy' and it was created by 'Bruno Neffren'. The progress bar is at 25%.
- Goal 2 - 2023**: This card is collapsed. It shows a progress bar at 25%.
- Goal 3 - 2023**: This card is collapsed. It shows a progress bar at 50%.

A red box highlights the upward arrow icon next to 'Goal 1 - 2023', indicating that clicking this icon expands the goal details.

Recording / Adding a Goal

1. Click on the **+ Add Goal** icon located at the top right corner of **My Goals** screen



2. The **Add Goal** screen box displays.

TRCA Performance

- Record the goal name in the **Name** field.
- Record the description of the goal in the **Description** field. Follow the **SMART** method of establishing goals/objectives.
- Enter the Goal **Start Date** and **Due Date** for the current performance year (e.g., Jan 1 – Dec 31.)
- Record the **Goal Category** for your goal.
 - Goal to be aligned to any of TRCA's four 'Strategic Pillars' or 'Divisional Objective'.
 - A maximum of five total goals are to be recorded per year.

Goal Category *

Select an Option...

Divisional Objective

Pillar 1 - Environmental Protection and Hazard Mana

Pillar 2 - Knowledge Economy

Pillar 3 - Community Prosperity

Pillar 4 - Service Excellence

- Select and record a value for **Measure Type** for your Goal/Objective.
 - Select either: **Percentage** or **Actual / Target** as the type of measurement.

Measure Type *

Select an Option...

Percentage

Actual / Target

If **Actual / Target** is selected for **Measure Type**, then two additional fields appear:

• **Target Type**

• **Target**

Measure Type *

Actual / Target

Goal progression percentage is calculated as the actual value divided by the target value. The actual value is entered by the individuals that are assigned to the goal.

Target Type *


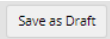

Select an Option...


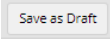
Target *

- If 'Actual / Target' is selected, you must record either **Amount (\$)** or **Count** for Target Type.

- Then enter a **Target** (amount).

The screenshot shows two form elements. On the left is a dropdown menu labeled 'Target Type *' with a search icon. The dropdown is open, showing two options: 'Amount(\$)' and 'Count'. The 'Amount(\$)' option is highlighted with a red rectangular box. On the right is a text input field labeled 'Target *' with a vertical scrollbar on the right side.

8. Click  at the bottom right hand corner of the screen to save as an active Goal/Objective.
9. If you click  the goal is part of your **Draft Goals** and won't be included in any Review forms. Clicking  "**publishes**" the goal, they are part of **My Goals**.

Note: If you want to keep the goal in 'Draft' status (i.e., keep it still recorded in the 'Draft Goals' screen), don't click  - that will always publish and share your goals – rather, click  ("Save as Draft") again and again for as long as you want them as draft goals.

Goal Start Date and Due Date – Best Practice

Ensure that both the 'Goal Start Date' and the 'Due Date' you record fall in the same calendar year.

Even if the same goal spans multiple years, you must ensure the previous entry has a Due Date equal to 'December 31, 20XX' and that a new entry for the goal be recorded for the following year accordingly.

Dayforce Performance does allow you to record dates for a goal to span more than one year, but there is a small chance your review form will not pick up the goal when this is the case.

Best practice is that the 'Goal Start Date' and 'Due Date' recorded fall in the same calendar year.

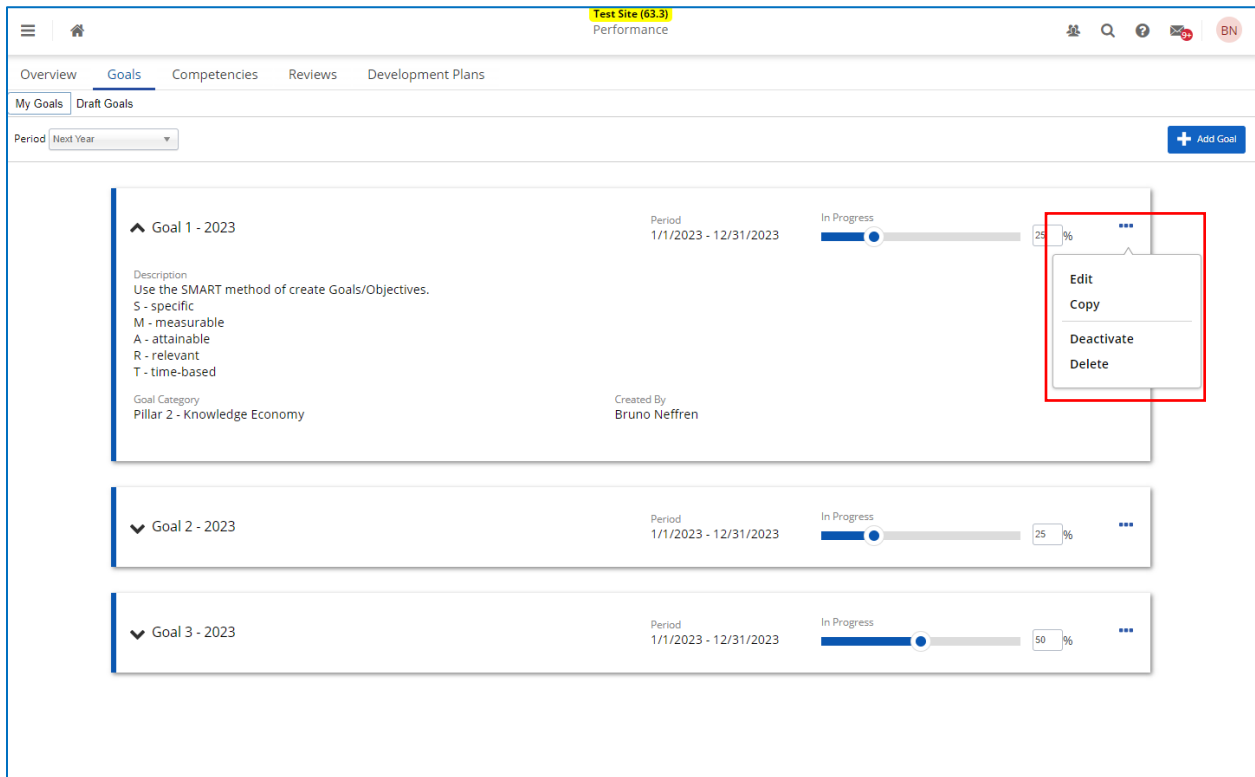
The screenshot shows the 'Add Goal' form in Dayforce Performance. The form is titled 'Add Goal' and has a close button (X) in the top right corner. The left sidebar shows 'Add Goal - English (US)'. The main form area contains the following fields:

- Name ***: A text input field.
- Description**: A rich text editor with various formatting options (bold, italic, underline, list, link, etc.).
- Goal Category ***: A dropdown menu with the text 'Select an Option...'.
- Start Date ***: A date input field with a calendar icon, showing '1/1/2023'. This field is highlighted with a red box.
- Due Date ***: A date input field with a calendar icon, showing '12/31/2023'. This field is highlighted with a red box.
- Measure Type ***: A dropdown menu with the text 'Select an Option...'.
- Language**: A section with the text 'Select the languages that you want this goal to be available in.' and two checkboxes: 'English (US)' (checked) and 'Français (Canada)' (unchecked).

At the bottom of the form, there are three buttons: 'Save as Draft', 'Finish' (with a checkmark icon), and 'Cancel'.

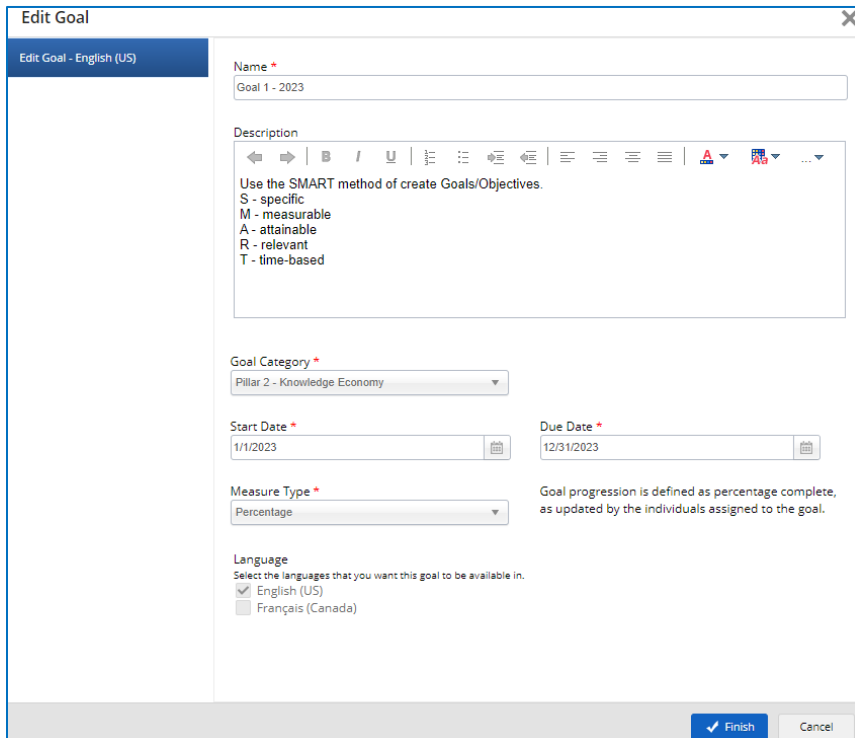
Edit Goal

To edit a goal, click on the ellipsis  button for the goal, select **Edit**.



The screenshot shows the 'Performance' dashboard with a 'Goals' tab selected. Under 'My Goals', there are three goals listed. The first goal, 'Goal 1 - 2023', is expanded, showing its details: Description (Use the SMART method of create Goals/Objectives. S - specific, M - measurable, A - attainable, R - relevant, T - time-based), Goal Category (Pillar 2 - Knowledge Economy), and Created By (Bruno Neffren). The goal is currently at 25% completion. The ellipsis menu for this goal is open, showing options: Edit, Copy, Deactivate, and Delete. The 'Edit' option is highlighted with a red box.

Continue to edit the details consistent with the steps described above.



The 'Edit Goal' modal form is shown. It contains the following fields and options:

- Name ***: Goal 1 - 2023
- Description**: Use the SMART method of create Goals/Objectives. S - specific, M - measurable, A - attainable, R - relevant, T - time-based
- Goal Category ***: Pillar 2 - Knowledge Economy
- Start Date ***: 1/1/2023
- Due Date ***: 12/31/2023
- Measure Type ***: Percentage
- Language**: Select the languages that you want this goal to be available in.
 - ☒ English (US)
 - ☐ Français (Canada)

At the bottom right, there are 'Finish' and 'Cancel' buttons.

Goal Progress

You update the **Progress** for your goal by moving the Progress slider, or, by entering a value in the associated box.

The slider and value are connected – update either and the other one updates accordingly.

The screenshot displays the 'Goals' tab in the TRCA Performance system. It shows a list of three goals for the period 1/1/2023 - 12/31/2023. Each goal has a progress slider and an input box for the percentage value. The first goal, 'Goal 1 - 2023', has a progress slider set to 25% and an input box containing '25'. The second goal, 'Goal 2 - 2023', has a progress slider set to 25% and an input box containing '25'. The third goal, 'Goal 3 - 2023', has a progress slider set to 50% and an input box containing '50'. The input box for the first goal is highlighted with a red rectangle.

| Goal | Period | Progress (%) | Input Box (%) |
|---------------|-----------------------|--------------|---------------|
| Goal 1 - 2023 | 1/1/2023 - 12/31/2023 | 25 | 25 |
| Goal 2 - 2023 | 1/1/2023 - 12/31/2023 | 25 | 25 |
| Goal 3 - 2023 | 1/1/2023 - 12/31/2023 | 50 | 50 |

When the review form displays the goal, it will also display the related progress.

Goal Status

Dayforce automatically displays the progress **status** for each goal by using a colour-coded bar on the left edge of the Goal panel.



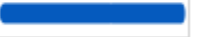
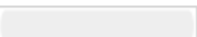

Gray: Not Started. The goal is 0% completed.

Green: Completed. The goal is 100% completed.

Blue: In Progress. The goal is on track to be completed by the due date.

Red: Overdue. The goal has passed the due date and is not completed.

Orange: At Risk. The goal progress is 10% or more behind the expected progress, calculated by an algorithm that projects progress based on Start Date and the Due Date.

| | | |
|-------------|--|---|
| At Risk | The goal progress is 10% or more behind the expected progress. |  |
| Overdue | The goal has passed the due date and is not completed. |  |
| In Progress | The goal is on track to be completed by the due date. |  |
| Not Started | The goal is 0% completed. |  |
| Completed | The goal is 100% completed. |  |

Test Site (63.3)

Performance

Overview

Goals

Competencies

Reviews

Development Plans

My Goals

Draft Goals

Period

Current Year


+ Add Goal

▼ Goal 1

Period

1/1/2022 - 12/31/2022

In Progress




95%

▼ Goal 2

Period

1/1/2022 - 12/31/2022

At Risk



350


500

▼ Goal 3

Period

1/1/2022 - 12/31/2022

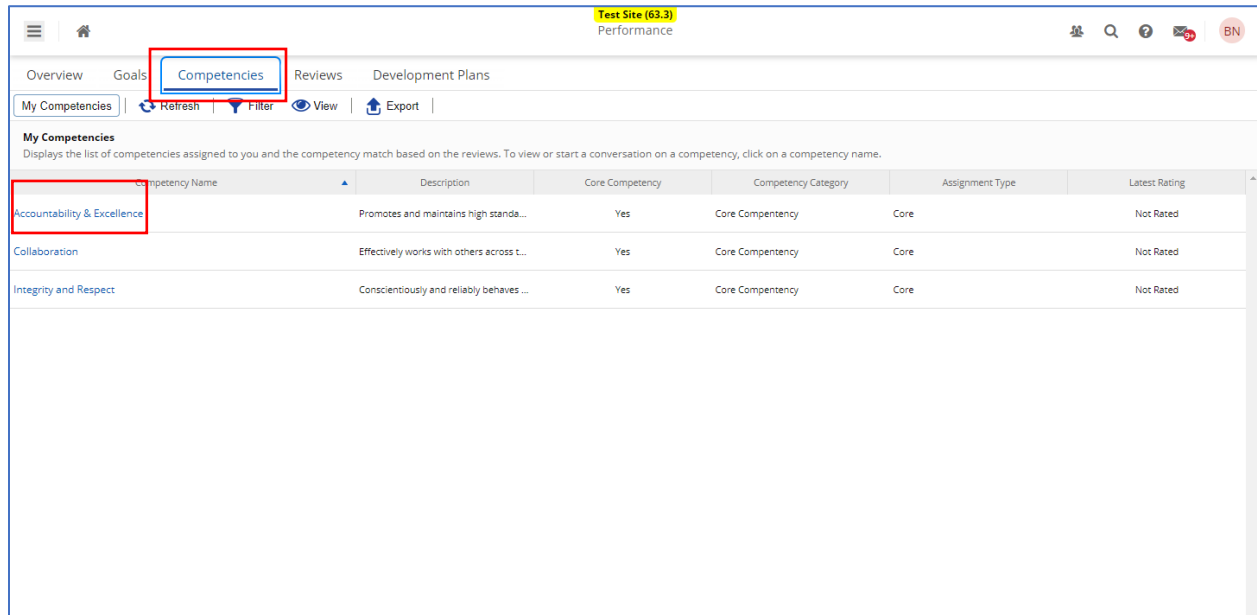
At Risk



75%

Competencies Screen

Click on the [Competencies](#) button to display the **Competencies** screen. It displays competencies that are assigned to you.



Test Site (63.3)
Performance

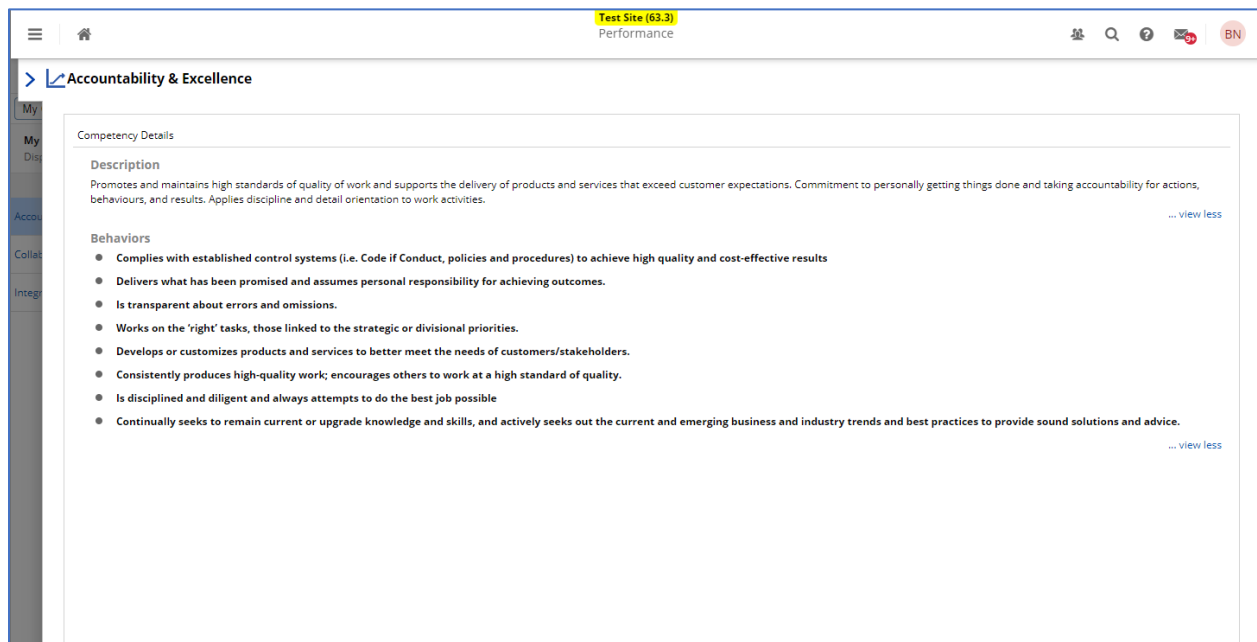
Overview Goals **Competencies** Reviews Development Plans

My Competencies Refresh Filter View Export

My Competencies
Displays the list of competencies assigned to you and the competency match based on the reviews. To view or start a conversation on a competency, click on a competency name.

| Competency Name | Description | Core Competency | Competency Category | Assignment Type | Latest Rating |
|-----------------------------|---|-----------------|---------------------|-----------------|---------------|
| Accountability & Excellence | Promotes and maintains high standa... | Yes | Core Competency | Core | Not Rated |
| Collaboration | Effectively works with others across t... | Yes | Core Competency | Core | Not Rated |
| Integrity and Respect | Conscientiously and reliably behaves ... | Yes | Core Competency | Core | Not Rated |

Click on a competency to display additional details and expected behaviours. (Click '[...view more](#)/[...view less](#)').



Test Site (63.3)
Performance

> **Accountability & Excellence**

My
My Dis
Acco
Colla
Integ

Competency Details

Description
Promotes and maintains high standards of quality of work and supports the delivery of products and services that exceed customer expectations. Commitment to personally getting things done and taking accountability for actions, behaviours, and results. Applies discipline and detail orientation to work activities. [... view less](#)

Behaviors

- Complies with established control systems (i.e. Code of Conduct, policies and procedures) to achieve high quality and cost-effective results
- Delivers what has been promised and assumes personal responsibility for achieving outcomes.
- Is transparent about errors and omissions.
- Works on the 'right' tasks, those linked to the strategic or divisional priorities.
- Develops or customizes products and services to better meet the needs of customers/stakeholders.
- Consistently produces high-quality work; encourages others to work at a high standard of quality.
- Is disciplined and diligent and always attempts to do the best job possible
- Continually seeks to remain current or upgrade knowledge and skills, and actively seeks out the current and emerging business and industry trends and best practices to provide sound solutions and advice. [... view less](#)

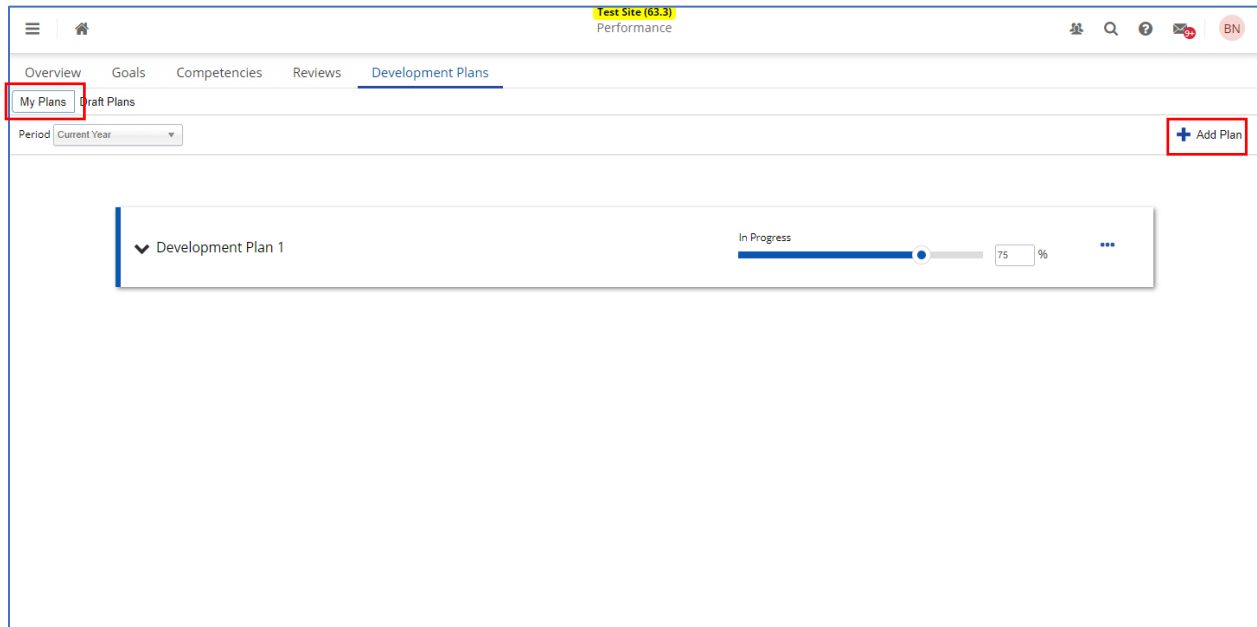
Competency Assignment Matrix

Competencies are assigned by **Competency Type**, as follows.

| Competency Type | Assignment | | |
|-------------------|---------------|----------|-------------------|
| | All Employees | Managers | Senior Leadership |
| Core | ✓ | | |
| Leadership | ✓ | ✓ | |
| Senior Leadership | ✓ | ✓ | ✓ |

Development Plans

Click on the [Development Plans](#) button to display the **Development Plans** screen. This screen is used to manage career development. Development Plans are set up for various reasons, for example to track and manage career planning or to improve performance.



To create a plan, click on the [+ Add Plan](#) icon located on the **My Plans** screen.

The **Add Plan** pop-up box displays.

- Record the **Name** and **Description** of the plan.
- Click the drop-down to record a value for **Purpose**.
- Record **Purpose Description**.
- Enter the **Plan Start Date** and **Due Date** for the current performance year (e.g., Jan 1 – Dec 31.)
- Click **Next**. The **Activities** tab will display, as per below.

Please note – **Activities** are optional and do not need to be recorded.

Add Plan

Plan Details

Activities

Enter the details for the activities associated with the development plan. Each activity will carry equal weight when calculating the plan's progress.

+ Add

Name *
Training Course

Due Date
6/30/2020

Description
Communication course.

Save as Draft Previous **Finish** Cancel

- Click the **+ Add** button to record any **Activity** to support the plan
- Record **Name**, **Due Date** and **Description**.
- Click **Finish** to save.

Test Site (63.9)

Performance

Overview Goals Competencies Reviews **Development Plans**

My Plans Draft Plans

Period: Next Year **+ Add Plan**

Development Plan 1 Period: 1/1/2023 - 12/31/2023 Not Started • Activities 0/1 0 %

Description
Improve skills and competencies to plan for desired promotion to manager.

Purpose
Improve specific skills / Competencies

Activities

Training Course Due Date: 6/30/2023 Not Started 0 %

Reviews Screen

Click on the [Reviews](#) button to display the **Reviews** screen. This screen lists performance review forms that are assigned to you. You record comments and ratings for your goals and competencies in these forms.

You also record comments for your development plans in these forms.

| Test Site (63.3) Performance | | | | |
|--|-----------------------|-------------|-----------|----------------|
| Overview Goals Competencies <u>Reviews</u> Development Plans | | | | |
| Refresh | View | | | |
| Review Cycle | Period | Status | Due Date | Manager Review |
| 2023 Year End Performance Review | 1/1/2023 - 12/31/2023 | Not Started | N/A | Not Rated |
| 2023 Mid-year Performance Review | 1/1/2023 - 7/28/2023 | Not Started | N/A | N/A |
| 2022 Year End Performance Review | 1/1/2022 - 12/31/2022 | Self Review | 11/4/2022 | Not Rated |
| 2022 Mid-year Performance Review | 1/1/2022 - 7/29/2022 | Self Review | 6/17/2022 | N/A |

Click on the **Review Form Name** to make it display. It displays as shown below.

| Test Site (63.3) Performance | | | | |
|---|--|--|--|--|
| 2023 Mid-year Performance Review Not Started 0 out of 7 Items reviewed | | | | |
| <div> <div> Bruno Neffren Analyst, Community Partnership </div> <div> Period 1/1/2023 - 7/28/2023 </div> </div> | | | | |
| <div> <p>When you save your review as draft, it will be visible to your managers.</p> <p>Mid-year review meeting: employee and manager to assess progress to date and adjust as necessary. Manager completes the mid-year check-in reviewing both objectives, competency demonstration, and makes comments on progress. The ... view more</p> </div> | | | | |
| <div> Section 1: Objective Evaluation </div> | | | | |
| <div> Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. Two to The ... view more </div> | | | | |
| <div> <div> 1. Goal 3 - 2023 <div> Due Date 12/31/2023 </div> <div> % Complete 50% </div> </div> <div> Goal 3 2023 Description </div> <div> Comments * </div> </div> | | | | |
| <div> <div> 2. Goal 1 - 2023 <div> Due Date 12/31/2023 </div> <div> % Complete 25% </div> </div> <div> Use the SMART method of create Goals/Objectives. </div> <div> Comments * </div> </div> | | | | |
| <div> <div>Print</div> <div>Cancel</div> </div> | | | | |

Review Form Sections

The **Review Form** is where you enter comments and ratings for your performance. Your manager will also record comments and ratings for your performance.

Your manager accesses your form under their login.

The form consists of up to four sections.

| | |
|--|--|
| Goals Evaluation | Includes the goals you created in the Goals screen. |
| Competency Evaluation | Includes the competencies assigned to you in the Competency screen. |
| Career and Development Planning | Includes custom questions set by the Human Resources to collect supplementary information. |
| Development Plan Evaluation | Includes development goals you created in the Development Goals screen. |

View More / View Less

When a **Review Form** is opened there are sections and sub-sections that can be expanded or collapsed by clicking on '[..view more](#)' or '[...view less](#)'.

The screenshot displays the TRCA Performance Review Form for Bruno Neffren, Analyst, Community Partnership, for the period 1/1/2023 - 7/28/2023. The form is titled '2023 Mid-year Performance Review' and is currently 'Not Started'. It shows '0 out of 7 Items reviewed'.

Section 1: Objective Evaluation

Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development. Two to

1. Goal 3 - 2023 Due Date: 12/31/2023 % Complete: 50%

Use the SMART method to create Goals/Objectives.

Comments +

[...view more](#)

2. Goal 1 - 2023 Due Date: 12/31/2023 % Complete: 25%

Use the SMART method to create Goals/Objectives.

Comments +

[...view more](#)

Print Cancel

Mid-year Review Form

The **Mid-year Review Form** includes three sections.

| | |
|------------------------------------|---|
| Goal Evaluation | Includes the goals you created in the Goals screen. |
| Competency Evaluation | Includes the competencies assigned to you in the Competency screen. |
| Development Plan Evaluation | Includes the development plans you created in the Development Plans screen |

Goals Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your goals. Ratings are not part of the Mid-year review form.

The screenshot displays the '2022 Mid-year Performance Review' form for Bruno Neffren, Analyst, Community Partnership. The form is titled 'Self Review' and shows '8 out of 8 Items reviewed'. The main section is 'Section 1: Objective Evaluation', which includes a sub-section '1. Goal 1'. Below 'Goal 1', there is a 'Comments' field with a rich text editor toolbar and a text area. The 'Save as Draft' button is located at the bottom left of the form. The '2022 Mid-year Performance Review' link is highlighted in the top left navigation bar.

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 goals.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the review form.

Competency Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your competencies. Ratings are not part of the Mid-year review form.

The screenshot displays the '2022 Mid-year Performance Review' form for Bruno Neffren, Analyst, Community Partnership. The form is titled 'Performance' and shows '0 out of 6 Items reviewed'. The current section is '2. Accountability & Excellence', which includes a description: 'Promotes and maintains high standards of quality of work and supports the delivery of products and services that exceed customer expectations. Commitment to personally getting things done and taking accountability for actions, behaviours, and results. Applies discipline and detail orientation to work activities.' Below the description is a list of behaviors:

- Complies with established control systems (i.e. Code of Conduct, policies and procedures) to achieve high quality and cost-effective results
- Delivers what has been promised and assumes personal responsibility for achieving outcomes.
- Is transparent about errors and omissions.
- Works on the 'right' tasks, those linked to the strategic or divisional priorities.
- Develops or customizes products and services to better meet the needs of customers/stakeholders.
- Consistently produces high-quality work; encourages others to work at a high standard of quality.
- Is disciplined and diligent and always attempts to do the best job possible
- Continually seeks to remain current or upgrade knowledge and skills, and actively seeks out the current and emerging business and industry trends and best practices to provide sound solutions and advice.

Below the behaviors list is a 'Comments' field with a rich text editor. The 'Comments' field is highlighted with a red box. The 'view less' links are also highlighted with red boxes. The 'Save as Draft' button is highlighted with a red box. The 'Comments' field is highlighted with a red box. The 'Save as Draft' button is highlighted with a red box.

To record your comments in the form:

1. Click the two '[..view more](#)' links to view the i) description of the competency, ii) the associated behaviours.
2. Click on the **Comments** field to add your comments.
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 the review form.

Development Plans Evaluation

As part of the **Mid-year** review form, you are required to provide comments on how you are progressing with your development plans.

The screenshot shows the '2022 Mid-year Performance Review' form for Bruno Neffren. The form is titled 'Section 3 - Development Plan' and contains a table with one row for '1. Development Plan 1'. The table has columns for 'Due Date' (12/31/2022) and '% Complete' (0%). The 'Comments' field for this plan is highlighted with a red box. The form also includes a 'Save as Draft' button and a 'Print' button.

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 any other development plans.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the review form.

Mid-year Review – Form Routing Process

There is no approval with the **Mid-year** review form. The form is routed to statuses as follows:

| | |
|------------------------|--|
| Mid-year Review | <ol style="list-style-type: none"> 1. Self-Review 2. Manager Review 3. Employee Signature 4. Manager Signature |
|------------------------|--|

Preview/Submit

When you are completed making updates to your review form, you are required to **Submit** it to your manager for review.

1. As you complete your review form, it is in 'Self Review' status.
2. When you are ready to submit, click the **Preview** button at the bottom of the form.

The screenshot shows the TRCA Performance Review Form interface. The form is titled "2022 Mid-year Performance Review" and is in "Self Review" status. The user's profile is Bruno Neffren, Analyst, Community Partnership. The review period is 1/1/2022 - 7/29/2022, and the due date is 6/17/2022. The form includes a section for "Objective Evaluation" with two goals. Goal 1 is "1. Goal 1" with a due date of 12/31/2022 and 95% completion. Goal 2 is "2. Goal 3" with a due date of 12/31/2022 and 75% completion. The form also has a "Comments" section with a rich text editor. At the bottom, there are buttons for "Autosave", "Save as Draft", "Print", "Preview", and "Cancel". The "Preview" button is highlighted with a red box.

The **Preview** screen displays your review form in a different layout, but it consists of everything just as you recorded.

1. Click the **Submit** button.

The screenshot shows the 'Preview' screen for a 2022 Mid-year Performance Review. The header includes a 'Test Site (63.3)' label and a 'Performance' tab. The main content area is divided into two sections: 'Section 1: Objective Evaluation' and 'Section 2: Competency Evaluation'. Section 1 contains three goals, each with a 'Comments' field. Section 2 contains two items, each with a 'Comments' field. At the bottom right, a red box highlights the 'Submit' button, with a 'Cancel' button next to it. The bottom left has a 'Print' button. The top right shows '6 out of 6 Items reviewed' and a user profile icon 'BN'.

Manager Review

After you submit your review form to your manager, its status changes from **Self Review** to **Manager Review**.

Under this status you cannot record any further updates – the form is locked.

The screenshot displays the '2022 Mid-year Performance Review' interface. At the top, the status is 'Manager Review', which is highlighted with a red box. The user profile for Bruno Neffren, Analyst, Community Partnership, is shown with a period of 1/1/2022 - 7/29/2022 and a due date of 7/29/2022. The interface includes a section for 'Section 1: Objective Evaluation' with a description: 'Employee and supervisor meet to establish objective setting for current year which includes alignment to TRCA's Strategic Plan Pillars and divisional priorities, job requirements, competencies and development.' Below this, there are two goal entries: '1. Goal 1' and '2. Goal 3'. Each goal entry shows a 'Due Date' (12/31/2022 for Goal 1, 12/31/2022 for Goal 3) and a '% Complete' bar (95% for Goal 1, 75% for Goal 3). Each goal also has a 'Comments' section with a text area for 'Employee comment.' and a 'view more' link. At the bottom, there are 'Print' and 'Cancel' buttons.

Reopen

If necessary, if you want to make changes to what you recorded (or if your manager wants you to), your manager has the option to **Reopen** your review form. This means you are given the opportunity to make changes to the comments and ratings you recorded and then **Submit** it all over again.

Employee Signature

When your manager completes and submits your Mid-year review form, its status changes to **Employee Signature**.

Under this status, the comments your manager recorded in your review form are now visible to you.

The screenshot displays the '2022 Mid-year Performance Review' interface for Bruno Neffren, an Analyst in Community Partnership. The review period is from 1/1/2022 to 7/29/2022, with a due date of 8/5/2022. The status is 'Employee Signature', and 6 out of 6 items have been reviewed.

Two goals are listed:

- 1. Goal 1:** Due Date 12/31/2022, 95% Complete. The goal description is 'Use the SMART method of create Goals/Objectives.' The 'Tisa's Comments' section (Manager comment) is highlighted with a red box.
- 2. Goal 3:** Due Date 12/31/2022, 75% Complete. The goal description is 'Use the SMART method of create Goals/Objectives.' The 'Tisa's Comments' section (Manager comment) is highlighted with a red box.

Each goal has a corresponding 'Bruno's Comments' section (Employee comment) and a 'Tisa's Comments' section (Manager comment). The 'Manager comment' sections are highlighted with red boxes.

The bottom of the interface includes a 'Print' button and 'Complete Review' and 'Cancel' buttons.

At this point you are required to provide your sign-off.

1. Access and display your Review Form. Scroll down to the bottom.
2. Check the **'I Agree'** box.
3. Enter any **Comments**.
4. Click **Complete Review**.

Test Site (63.3)

Performance

2022 Mid-year Performance Review | Employee Signature | Review steps closed: Self Review, Manager Review on 12/20/2022 by Administrator

1 out of 4
Items reviewed

Bruno Neffren
Analyst, Community Partnership

Period
1/1/2022 - 7/29/2022

Due Date
8/5/2022

Improve skills and competencies to plan for desired promotion to manager.

Bruno's Comments *

Tisa's Comments

Employee comment.

Signature

Bruno Neffren's Signature

☐ I agree.

Comments

Font

Print

Complete Review

Cancel

Year-end Review Form

The **Year-end Review Form** includes four sections.

| | |
|--|--|
| Goal Evaluation | Includes the goals created in the Goals 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 Plan Evaluation | Includes development goals you created in the Development Plans screen. |

Performance Evaluation Rating Matrix

The header for the review form contains the **Evaluation Rating Matrix**. Click '[..view more](#)' if this header collapsed.

You refer to this to help gauge the ratings you record for your performance.

Test Site (63.3)
Performance

2022 Year End Performance Review | Self Review

0 out of 9
Items reviewed

Bruno Neffren
Analyst, Community Partnership

Period
1/1/2022 - 12/31/2022

Due Date
11/4/2022

Bruno Neffren's Avg. Rating
Not Rated

When you save your review as draft, it will be visible to your managers.

Year-end Appraisal to discuss results and evaluate performance. It should be a re-cap of the supervisor feedback and coaching which takes place throughout the year. The employee completes a self-assessment first and then a discussion takes place with the supervisor. Development opportunities are identified and connected to performance gaps, performance enhancements, skill development or key aspects of the employee's role.

| 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 (ACE) |
| <p>Expected behaviours are seldomly demonstrated;</p> <p>SMART objectives were not set or were not met;</p> <p>Fails to meet the criteria of the job;</p> <p>Falls short of performance targets;</p> <p>Provides inadequate support for the mission, vision or strategic objectives of the organization;</p> <p>Performs below the beginner or developmental stage of demonstrable knowledge, skills and abilities;</p> <p>Exhibits deficient work and competencies.</p> | <p>Developmental opportunity to consistently demonstrate desired behaviours;</p> <p>Delivers on some but not all established SMART objectives;</p> <p>Requires improvement to fully meet performance targets;</p> <p>Provides basic support to the mission, vision or strategic objectives of the organization;</p> <p>Developmental stage of demonstrable knowledge, skills and abilities;</p> <p>Exhibits some but not all competencies and work;</p> <p>Requires guidance and training to improve performance.</p> | <p>Expected behaviours demonstrated consistently;</p> <p>Consistently meets established SMART objectives;</p> <p>Achieves results at a level that meets performance targets;</p> <p>Demonstrates commendable support to the mission, vision or strategic objectives of the organization;</p> <p>Demonstrates fully proficient knowledge, skills and abilities, required work, and competencies.</p> | <p>Mastered behaviours, viewed as a role model;</p> <p>Exceeds in delivering on the established SMART objectives;</p> <p>Sustains consistent exemplary performance throughout the review period;</p> <p>Provides excellent service in support of the mission, vision or strategic objectives of the organization;</p> <p>Consistently exceeds and sometimes far exceeding the criteria of the job;</p> <p>Consistently demonstrates initiative for the benefit of the organization, their division and business unit;</p> <p>Demonstrates full mastery of knowledge, skills and abilities, required work and competencies.</p> |

Autosave ☐ Save as Draft

Goals Evaluation

As part of the **Year-end** review form, in addition to comments, you are required to provide ratings on how you are progressing in your goals.

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.
2. Record a **Rating** for performance by clicking / dragging the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** fields and **Rating** scales to enter additional information for other goals.
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 '2022 Year End Performance Review' form. The top navigation bar includes a home icon, a menu icon (highlighted with a red box), and user information. The main content area is titled 'Section 1 - Objective Evaluation' and shows 'Bruno's Avg. Rating Not Rated'. Below this, there are two goal evaluation sections: '1. Goal 1' and '2. Goal 3'. Each goal section includes a 'Rating' slider (highlighted with a red box) and a 'Comments' text area (highlighted with a red box). The 'Save as Draft' button is highlighted with a red box at the bottom of the form. The bottom of the form also includes an 'Autosave' toggle, a 'Print' button, and 'Preview' and 'Cancel' buttons.

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 in your competencies.

To record your comments and ratings in the form:

1. Click on the **Comments** field to add your comments.
2. Record a **Rating** for performance by clicking / dragging the slider on the scale.
3. Use the scroll bar to navigate to other **Comment** fields and **Rating** scales 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 '2022 Year End Performance Review' form for Bruno Neffren. The interface includes a top navigation bar with a home icon, a 'Test Site (63.3)' label, and user information. The main content area is titled 'Section 2 - Competency Evaluation' and contains two competency sections: '1. Collaboration' and '2. Accountability & Excellence'. Each section includes a description, a list of behaviors, a rating scale (currently set to 'Not Rated'), and a comments field. The 'Rating' field and the 'Comments' field are highlighted with red boxes. At the bottom of the form, there are buttons for 'Autosave', 'Save as Draft', 'Print', 'Preview', and 'Cancel'. A vertical scrollbar is visible on the right side of the form.

Career and Development Planning

As part of the Performance Review cycle for **Year-end** you are required to provide comments on **Career and Development Planning - Additional Questions**.

The questions are text based. Record your comments.

The screenshot displays the '2022 Year End Performance Review' form for Bruno Neffren. The form is titled 'Section 3 - Career and Development Planning' and contains three text-based questions. The first question is 'I am satisfied with continuing to develop within the current position', the second is 'I am interested in other opportunities in my current career path', and the third is 'I am interested in opportunities outside my career path'. Each question has a corresponding 'Answer' field with a rich text editor. The interface includes a sidebar on the left with a navigation menu, a top header with user information (Bruno Neffren), and a bottom footer with 'Save as Draft', 'Print', 'Preview', and 'Cancel' buttons. Red boxes highlight the navigation menu, the first question's answer field, the second question's answer field, and the 'Save as Draft' button.

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 additional questions.
3. To save, click **Save as Draft**.
4. Click arrow at top left corner of screen to exit the **Review Form**.

Development Plans

As part of the review cycle for **Year-end**, you are required to provide comments on how you are progressing with your development plans.

The screenshot displays the '2022 Year End Performance Review' interface. At the top, the user's profile 'Bruno Neffren' is shown with the role 'Analyst, Community Partnership'. The review period is '1/1/2022 - 12/31/2022' and the due date is '11/4/2022'. The user's average rating is 'Not Rated'. The main content area features a question 'I am interested in opportunities outside my career path' with an 'Answer' field. Below this is 'Section 4 - Development Plan' which includes a sub-section '1. Development Plan 1' with the goal 'Improve skills and competencies to plan for desired promotion to manager.' and a 'Comments' field. The bottom of the form has buttons for 'Autosave', 'Save as Draft', 'Print', 'Preview', and 'Cancel'. Red boxes highlight the '2022 Year End Performance Review' link in the top left, the 'Comments' field, the 'Save as Draft' button, and the vertical scroll bar on the right side of the form.

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 any 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 Review – Approval Process

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

| | |
|------------------------------------|--|
| Year End Performance Review | <ol style="list-style-type: none"> 1. Self Review 2. Manager Review 3. Human Resources Approval (Pending Approval) 4. Employee Signature 5. Manager Signature |
|------------------------------------|--|

Employee Action – Same as Mid-year

You take the same steps for approval under **Year-end** review form as you do under **Mid-year** review.

The no apparent difference in the process for you. The only difference is that **Human Resources Approval** is slotted in between **Manager Review** and **Employee Signature**. After Human Resources approves the review, it will be routed to you for signature.