



Instructions for Supervisors: Conducting Performance Evaluations

A key component of an effective Performance Management System is the annual review; however, performance management should not be viewed as a once-a-year event. It is an ongoing process that happens every day. Consistent coaching and mentoring throughout the year are essential to supporting exceptional performance and achieving positive evaluation outcomes.

Key components of the performance evaluation document are:

1. **Competencies:** Six core competencies apply to the performance being evaluated. Review the definition of each competency and the explanations provided under each rating on the scale to determine the most accurate assessment.
2. **Comments:** Located below each competency, comments must be completed to support the rating assigned. Ratings should be clearly substantiated (e.g., a rating of 1 or 10 must be supported with appropriate rationale). If additional space is required, you may use the last page. Ensure you make note referring to the end of the document in the initial comment box. Then reference each competency in which the additional space is used for.
3. **Additional Competencies:** This section allows for the inclusion of position-specific or departmental competencies. You may add as many as are relevant. Again, you may use the additional space at the end of the document, same applicable as explained above.
4. **Professional/Management Competencies:** This section should be completed where applicable to the position being reviewed and is intended to supplement the core competencies.
5. **Goals Template:** This section should be completed to support the employee's development and inform future evaluations. If you already use a preferred goals template, you are welcome to continue using a format that works best for you and the employee.

Suggested Process:

1. Review the employee's previous performance evaluation.
2. Request that the employee prepare a status update on their previous goals and objectives.
 - a. Supervisors may also ask the employee to complete their own version of the evaluation and submit it in advance of the meeting. This can assist in completing the final evaluation and identifying key changes, development needs, and future goals.
3. Review the position description and job fact sheet, as applicable.
4. Complete the performance evaluation document and obtain any required feedback prior to the meeting.
5. Meet with the employee to conduct the performance review and discuss development plans and goals. Ensure all required signatures are obtained.
6. Submit a copy of the completed evaluation to Human Resources via the Google Form linked on the website.

***For questions or guidance related to approach, documentation, or process,
please email humanres@lakeheadu.ca***