

~ DO NOT INCLUDE THIS PAGE AS PART OF THE EVALUATION FORM ~

**Lakehead University
Performance Evaluation Review**

Instructions:

A key component of an effective Performance Management System is the annual review. Performance Management is something that needs to happen every day and should not be thought of as an annual event. To encourage great performance and a positive evaluation, consistent coaching and mentoring throughout the year should be occurring.

The attached document is based on the previous evaluation form that has been used at Lakehead. Slight modifications were made in 2016 to slowly integrate some positive change in the employee evaluation process pending a more robust review, consultation and system adjustment.

Some of the key changes you will find are:

1. Comment sections added to each competency. These should be completed to support the nature of the rating that is applied. I.e. you should not be giving someone a 10 or a 1 without being able to support that rating. (If you are printing the document prior to completing you will need to add additional space to these fields)
2. Additional Competencies: We have added a section for you to indicate specific position or departmental competencies. Some of you may have a number of these to add. Feel free to do so.
3. We have added a Professional/Management Section. This section should be used if the competencies are applicable to the position being reviewed and should be in addition to the rest of the document.
4. We have added a Goals Template. This should be completed to assist in the development and future evaluations. If you have a preferred template that you already use please feel free to use what you and your employee are comfortable with.

Suggested Process: (Please feel free to contact Human Resources (807-343-8334 or human.resources@lakeheadu.ca) with any specific question or discussion on approach, documentation or process issue)

1. Review previous performance evaluation of the employee.
2. Ask the employee to prepare previous goals and objectives – status report. Consider having the employee complete their version of the evaluation and have them send it to you prior to the meeting date. This can assist in completing your evaluation and help support key changes, goals and development needs.
3. Review position description and or job fact sheet as required.
4. Prepare your document and obtain any feedback necessary to complete the report.
5. Meet with the employee and complete the review, development plan and goals. Ensure that all necessary signatures are attained.
6. **Forward a copy of the report to Human Resources by May 15th.**