



HUMAN RESOURCES

Performance Management H303

POLICY

Southeast College strives to provide an environment where Employees understand the impact their work contributions have on the achievement of organizational goals. This policy outlines the evaluation process and ensures that performance reviews are conducted on a regular basis for Southeast College Employees.

PURPOSE

Southeast College has adopted a Performance Management Policy to work with its Employees and ensure that:

- 1) Organizational objectives are met through the achievement of individual Performance Goals and objectives.
- 2) All Employees are provided with accurate and appropriate feedback regarding their performance and, at their request, supported career planning and development; and
- 3) Employees receive timely feedback and assessment of qualifications, skills, abilities and general suitability during the probation period.

The policy within ensures Employees have a clear understanding of expectations, receive ongoing feedback regarding how they are performing relative to expectations, to identify development opportunities and goals, and for managers to address performance that does not meet expectations within the Probationary Period.

Performance management is ongoing and cyclical in nature.

SCOPE

This policy applies to all in-scope and out-of-scope Employees of Southeast College, without exception.

GUIDELINES

Performance Management is a tool to support communication of expectations, acknowledgement of contributions – including both success and areas for improvement, and documentation of Probationary Employees' performance. The process will facilitate collaboration between Employees, Supervisors and managers to ensure Employees understand, meet or exceed their job requirements and strategic objectives.

The performance review process does not limit or negate any of the rights for in-scope Employees as outlined in the Collective Bargaining Agreement.

DEFINITIONS

Career Development Plan – established to help the Employee determine objectives in which will assist them in achieving their professional goals through training, development and/or mentoring.

Competencies – the key qualifications, skills, abilities and overall general suitability for the position.

Performance Appraisal – the written assessment of an Employee's performance completed by the Employee and their Supervisor.

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Performance Goals – are performance expectations that are defined by the Supervisor and discussed with the Employee. These goals help to define what is expected of Employees in their current position in relation to the department's overall goals and Southeast College's strategic objectives.

Performance Improvement Plan (PIP) – established to help the Employee succeed in meeting specific Performance Objectives and will outline specific actions or training required to restore performance to satisfactory levels.

Performance Objectives – quantifiable measures of acceptable performance within the appointed position.

Performance Plan – a workplan including goals and objectives outlined for the assessment period (ie. Probationary Period or annual review) based on the qualifications, skills, and abilities required for the position, aligned with organizational and department goals.

Probationary Period – as defined in employment contract and/or Article 8 of the CBA for in-scope Employees.

Probationary Employee – an Employee upon initial hire, or who has been promoted or changed positions, currently serving the Probationary Period.

Permanent Employee – an Employee that has successfully completed their Probationary Period.

PRINCIPLES

PROBATIONARY EMPLOYEE PERFORMANCE APPRAISALS

Performance Plans will be created and updated for Probationary Employees upon commencement of employment. Coaching and feedback will be ongoing. A formal mid-point probationary feedback meeting should be scheduled within the first 3 months so that performance and progression towards established goals and objectives may be assessed within the new role. A second mid-point meeting should be scheduled no later than two-thirds of the way through the Probationary Period. Final probationary reviews and completion of the Performance Appraisal form will be scheduled no later than three weeks prior to the end of the Probationary Period.

PERMANENT EMPLOYEE PERFORMANCE APPRAISALS

Permanent Employee's Performance Plans should be updated yearly at the end of the preceding Performance Appraisal period. Coaching and feedback will be ongoing. An annual Performance Appraisal will be scheduled no later than June 30th, or earlier to align with term contracts.

CAREER DEVELOPMENT PLAN

Career Development Plans are intended to assist the Employee in articulating their professional aspirations and should be driven by the Employee supported by the immediate Supervisor. Career Development Plans are optional for Employees.

If an Employee has a Career Development Plan, an annual review will incorporate a review of progress towards such goals and to ensure that the organization is supporting the Employee where possible.

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PERFORMANCE IMPROVEMENT PLAN

In the event that an Employee's performance requires improvement, the Supervisor may implement a Performance Improvement Plan (PIP) in consultation with their Out-of-Scope Manager and Human Resources.

The PIP will outline specific actions or training required to restore performance to satisfactory levels. The Employee will be asked to sign the PIP to demonstrate commitment to improve. The PIP will be in writing, with a copy forwarded to Human Resources for inclusion in the Employee's personnel file.

CONFIDENTIALITY

All information including performance management forms and discussions in performance review meetings will be held confidential and only shared on an as-needed basis. All forms utilized for the performance management process will be signed and stored in the Employee's Human Resources Personnel File.

ROLES AND RESPONSIBILITIES

Human Resources Responsibilities

- Provide a performance management process that is fair and transparent.
- Provide the tools and forms necessary to facilitate the performance management process.
- Provide training and guidance to Supervisors and Employees on the performance management process.
- Provide guidance and support to Supervisors and Out-of-Scope Managers in the development of effective Performance Improvement Plans (PIPs), as necessary.
- Oversee and administer the probationary review scheduling between Supervisors and Employees.
- Upon receipt of fully executed probationary evaluation forms, ensure Employees receive an official record of their successful probation.
- Maintain records of probationary performance evaluations and annual Performance Appraisals within the Human Resources Personnel Files.

Supervisor Responsibilities

- Prepare a Performance Plan for each Probationary Employee who reports directly to them upon commencement of employment, ensuring fair and attainable Performance Goals and objectives are established.
- Update a Performance Plan with Permanent Employees on an annual basis, as part of the ongoing Performance Appraisal cycle.
- Provide ongoing feedback and recognition to Employees in the form of coaching and formal feedback meetings.
- During the Probationary Period, provide Employees with continuous and timely performance feedback, on a regular basis. Any issues or concerns must be dealt with as they occur.
- Accurately report and document performance observations/discussions (both formal and informal).
- Conduct performance reviews and mid-point probationary reviews utilizing the performance evaluation forms provided by the College and conduct in accordance with the indicated timelines.
- Complete performance evaluation forms for Employees who separate from their work group or from the College. Employee consultation and input is not always possible in the latter.

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- Implement Performance Improvement Plans as necessary, in consultation with HR, to support Employees in meeting Performance Objectives through specific actions or training to restore performance to satisfactory levels.
- Conduct Performance Appraisals with respect and adhere to the confidentiality requirements herein.
- Complete and submit required performance evaluation forms within the specified timelines.

Employee Responsibilities

- Fulfill performance requirements which include demonstrating values and key Competencies, performing position duties and responsibilities, and achieving Performance Plan objectives.
- Work with Supervisors to provide input in the creation of individual Performance Plans and reviews as required.
- Participate in Performance Appraisals with respect and adhere to the confidentiality requirements herein.
- Complete and submit required performance evaluation forms within the specified timelines.
- Attend performance meetings and training as required.
- Engage in the objectives outlined in Performance Improvement Plans to the best of their ability.

PROCEDURE

Performance Management is ongoing and cyclical in nature with the process being broken down into three interrelated phases of Planning, Managing, and Review.

Phase I: Planning

The Planning Phase is the foundation of the Performance Management process. In this phase, a Performance Plan including goals and objectives are outlined for the assessment period (ie. Probationary Period or annual review) based on the qualifications, skills, and abilities required for the position.

Incorporate SMART (Specific, Measurable, Achievable, Relevant, and Time Based) goals to increase Employee motivation and commitment to goal achievement, leading to greater performance and productivity.

Goals will be tied to Southeast College strategic goals and departmental objectives, incorporating the organization's core values. Two goals for each objective should be the target.

The Performance Plan will be reviewed by the Employee with their Supervisor to discuss the goals and objectives that have been established. The Performance Plan will be utilized to not only establish Performance Objectives but will also act as a benchmark against which actual performance can be measured and dated.

Following a discussion of its contents the Performance Plan shall be signed by the Supervisor and Employee indicating each are aware and have a copy of their personal records. A copy of the signed form will be forwarded to Human Resources for the Employee's personnel file. These plans may be modified throughout the course of the performance review period.

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Phase II: Managing

Regular communication between the Supervisor and Employee is crucial during the managing phase of the performance management cycle. Through formal and informal conversations, coaching and regular feedback, both parties are kept abreast of progress towards the Employee's ability to successfully create positive results, and the Employee's skills, abilities in relation to the position. These discussions also enable the Supervisor to provide timely feedback and coaching as the Probationary Period unfolds. It is important for Supervisors and Employees to keep track of key performance highlights and/or challenges that occur. These notes will assist in the preparation and completion of the Performance Appraisal form.

Phase III: Review

At the conclusion of the performance management cycle, the Supervisor will meet with the Employee to conduct a Performance Appraisal based on the Performance Goals and objectives established in the planning stage. The ongoing communication and feedback from the managing phase will assist in preparing the performance evaluation form.

Prior to the scheduled performance review meeting, the Supervisor and the Employee will both complete the Performance Evaluation Form based on the Employee's pre-established goals and objectives. The performance review meeting will allow the Supervisor and Employee to discuss the results of the review.

The performance review meeting will consist of:

- A full review and discussion of the Employee's performance over the period based upon the goals and objectives established in the Performance Plan.
- A full review and discussion of the Employee's performance based upon the Competencies for Southeast College Employees.
- The establishment or amendment of the Employee's Performance Plan for the upcoming performance review period.
- Identification of learning, training, and overall growth opportunities, and upon request of the Employee the establishment of a Career Development Plan.
- Identification of any improvement areas and support that will be provided by the College, with implementation of a Performance Improvement Plan (PIP) if necessary.
- Recognition of Employee achievements and their contributions towards organizational goals.

TIMELINE AND ADMINISTRATION OF PERFORMANCE MANAGEMENT

Probationary Employees:

Performance Plans will be created and updated for Probationary Employees upon commencement of employment. Coaching and feedback will be ongoing.

A formal mid-point probationary feedback meeting should be scheduled within the first 3 months so that performance and progression towards established goals and objectives may be assessed within the new role.

A second mid-point meeting should be scheduled no later than two-thirds of the way through the Probationary Period.

Final probationary reviews and completion of the Performance Appraisal form will be scheduled no later than three weeks prior to the end of the Probationary Period. Completed evaluation forms will be signed by the Employee and Supervisor, as well as the Out-of-Scope Manager, and forwarded to Human Resources.

Upon receipt of completed performance evaluation forms Human Resources will provide the Employee with an official record of their successful probation.

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In rare circumstances, a Probationary Period may be extended to determine if required improvements can be made. In such cases, the Employee will be re-assessed prior to the end of the extended probation period.

In-scope Employees who are terminated as a result of an unsuccessful Probationary Period may enact the grievance procedure as outlined in the CBA.

Permanent Employees:

Permanent Employee's Performance Plans should be updated yearly at the end of the preceding Performance Appraisal period. Coaching and feedback will be ongoing.

An annual Performance Appraisal shall be scheduled for Permanent Employees no later than June 30th, or earlier to align with term contracts.

Completed evaluation forms will be signed by the Employee and Supervisor, as well as the Out-of-Scope Manager, and forwarded to Human Resources.

COMPLAINT PROCESS

Employees who feel they have been subject to an unfair performance review or who believe their Performance Plans to be out of the scope of their normal duties and responsibilities should forward a request for review to the Human Resources department.

Upon receipt of such request, the issue will be reviewed and if necessary, a formal investigation will be conducted, which could include a formal review of any performance management forms submitted, review of previous Performance Plans and reviews, interviews with the Employee and the Supervisor and investigation into current and past performance.

ACKNOWLEDGEMENT AND AGREEMENT

I, _____, acknowledge that I have read and understand Southeast College's Performance Management Policy. I agree to adhere to this policy and will ensure that Employee's working under my direction adhere to this policy.

Signature: _____

Date: _____

Witness: _____

Signature: _____

REFERENCES

H303.1 Performance Plan & Review Form – Instructional Employees

H303.2 Performance Plan & Review Form – Administrative Employees

H303.3 Performance Plan & Review Form – Management

H303.4 Career Development Plan

H303.5 Performance Improvement Plan

Collective Agreement: Article 8 Probationary Period, Article 19:Grievances

G54 Management Classification & Pay Plan

Effective Date:	April 2025 Replacing H303 & H304
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