



## Performance Assessment: Be Prepared!

Treasury Board has announced that it will be adopting a performance assessment process for all employees. Inherent in this process will be the concept of **shared responsibility** between management and employees. In order to help you prepare for your performance assessment and give you more control over the various aspects under your responsibility, CAPE has the following suggestions for you:

### 1) First meeting – Setting performance objectives

The employer must establish performance objectives for the year that are **specific, measurable, relevant and realistic**. **These objectives must be achievable within the allotted time period.**

#### Possible preparations:

- **Before the meeting to set performance expectations**
  - Your supervisor will be giving you your performance objectives during the course of this meeting. You can prepare for the meeting and even anticipate objectives that you consider realistic by consulting an up-to-date copy of your job description. You can require the employer to provide you with this current statement of duties if you do not already have it in your possession (LoP art. 27, TR art. 40, EC art. 34).
  - Performance objectives must be linked to your job description and must be **specific to your position**. This is true even if the statement of duties in question is a generic work description.
- **During the meeting**
  - Make sure you fully understand the performance objectives and what they mean. For example: What are the expected results? What constitutes a satisfactory or unsatisfactory result? How are expectations measured? You should also make sure the objectives are feasible and realistic. You should consider obstacles and constraints, the training and resources required to achieve the objectives, the individual aspect of your performance assessment, etc.
  - Check the objectivity of the expected results, and have anything that may seem subjective to you clarified in writing. According to management, your understanding of



the expectations and how you should go about achieving them should be confirmed through the use of paraphrase and repetition.

- The specific objectives of a position must be related clearly to the work unit, division or department. Do not hesitate to ask for explanations regarding this relationship.
  - If you disagree with the objectives that are set or if you have any concerns, do not hesitate to state the fact in writing near your signature on the “Performance Agreement” form, or to indicate that your concerns will be set out in a separate written document to follow. We recommend that you send **a copy by email**.
- **After the meeting**
    - If you raised concerns during the meeting, make sure that they are reflected in changes to the performance agreement, or follow up on these concerns in writing with your manager.
    - Do not hesitate to document any concerns that could possibly be detrimental to your performance and to inform your manager of such concerns (e.g., scale of a project that has been miscalculated in your view, lack of training or resources).

## 2) Mid-year review meeting

**Ongoing performance feedback is essential** to avoid any surprises and give you the opportunity to take any corrective steps that may be necessary.

Your supervisor should meet with you at the midway point of the assessment period to inform you of your performance to date, identify any discrepancies that have been noted and adjust the performance agreement or objectives if necessary. CAPE recommends that you ask for a **written assessment** at this point or for a record of this meeting **in writing**. If your manager refuses or does not give effect to this request, you can send the manager your own summary in writing (email) of the performance discussion or of your understanding of your performance to date, with a request that he or she correct any misinterpretations on your part.

It is important to keep a record of work, of management’s comments (both positive and negative) and of the correction of weaknesses identified by management, if any. Accordingly, during this meeting **and throughout the year**, **CAPE suggests the following actions, among others:**

- *With respect to your manager’s responsibilities:* inform your manager in writing of any failure or delays in meeting his or her commitments (e.g., training, support, resources or other terms and conditions identified in your performance agreement); keep a record of any requests for assistance or support on your part that have remained unanswered by your manager.



- *With respect to your working environment:* identify all circumstances, incidents, obstacles or other situations that may have been detrimental to your performance to date;
- *With respect to your person:* identify your accomplishments, projects, analyses and reports relevant to your performance. Also make note of any personal circumstances, such as illness or extended leave without pay, that may have affected your performance.
- Try to receive regular feedback from your manager, preferably in writing if it is positive feedback. Document all positive feedback received from your colleagues, clients, other managers, etc.
- Should you at any time require reasonable accommodation in respect of your duties or position, CAPE suggests that you submit a formal request for accommodation for reasons recognized under the Charter of Rights and Freedoms. Do not hesitate to discuss this subject with CAPE.

### **3) Annual formal performance assessment meeting**

At the end of the performance assessment period, your manager is required to inform you of your final performance results in terms of your achievement of objectives. This performance assessment should contain no surprises.

Do not hesitate to bring to this meeting any documentation prepared or accumulated during the course of the year in support of your performance.

If your manager gives you a positive performance assessment, keep a copy for your own records and ask to consult your personnel file to ensure that the assessment has been added to the file.

Should you have any doubts as to whether the terms and conditions of your collective agreement are being respected, consult our FAQ on performance assessments at:

<http://www.acep-cape.ca/en/faqs/>