

Public Health Competency Based Employee Performance Management Planning and Evaluation Tool

Public Health Competency Based Employee Performance Management Toolkit
OPHA & Partners, Version 2 (2010)



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Public Health Competency Based Employee Performance Management Planning and Evaluation Tool

Confidential when completed

PERFORMANCE EVALUATION
Employee Name:
Position Title:
Manager's Name/Title:
Review Period From <i>(Month/Year)</i> to <i>(Month/Year)</i>:

Rating Scale

A numeric and letter rating scale with corresponding descriptors has been provided. Choose the rating scale that best represents the culture of the organization and use it consistently throughout the document.

EE / 4		Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.
ME / 3		Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.
P / 2		Progressing Fulfilled some of the requirements of the objectives/competencies. Progress is being observed for the majority of requirements.
NI / 1		Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.

The profiled proficiency levels of the competencies and the 'Meets Expectations' rating represent the performance expected of a fully-functional individual who is experienced in his or her role. An individual who is new to his or her role and who is performing at an acceptable level, may receive an evaluation that reflects their development towards an expected proficiency level. They may receive a competency rating or an overall rating of 'Progressing' as a reflection of their continued growth and development in the role. This is normal and expected.

Employee Name:	
Planning Meeting Date:	
Interim Review Date:	
Performance Evaluation Date:	

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Section A – Performance Planning and Review

During the planning stage the manager and employee identify the performance objectives “WHAT” and key indicators “HOW” and target completion dates. See: Public Health Competency Based Employee Performance Management Planning and Evaluation Tool Sample for an example.

During the performance evaluation stage, the manager and employee discuss the extent to which each objective was demonstrated and record the outcome/results.

During the interim review, the manager documents any change to the plan.

PERFORMANCE PLANNING				ONGOING REVIEW AND EVALUATION		
PERFORMANCE OBJECTIVES (Expectations of what is to be achieved)		KEY INDICATORS (Behavioural expectations of how it will be done)	TARGET DATE (e.g. 12JAN10)	INTERIM REVIEW (Comments)	OUTCOME/RESULTS/EXAMPLES (Review outcomes to demonstrate what was achieved and how competencies were demonstrated)	RATING
1.						
2.						
3.						
4.						
5.						
6.						

EE/4 -Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.	ME/3 - Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.	P/2 - Progressing Fulfilled some of the requirements of the objective/ competencies. Progress is being observed for the majority of requirements.	NI/1 -Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.
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Section B – Competency Review

During the planning stage the manager and employee discuss the competency profile and record the agreed upon proficiency level for each competency in the expected proficiency level column below. During the performance evaluation the manager and employee review the employee's Self Assessment Tool results for each competency and discuss the extend to which the competency was demonstrated, giving a concrete behavioural example (i.e. what the employee actually did). The manager and employee then determine a rating jointly.

PERFORMANCE PLANNING		PERFORMANCE EVALUATION	
COMPETENCY	EXPECTED PROFICIENCY LEVEL	BEHAVIOURAL EXAMPLE	RATING
Public Health Sciences			
Assessment & Analysis			
Policy & Program Planning, Implementation & Evaluation			
Partnerships, Collaboration & Advocacy			
Diversity & Inclusiveness			
Communication			
Leadership			
Ethics & Professionalism			

EE/4 -Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.	ME/3 - Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.	P/2 - Progressing Fulfilled some of the requirements of the objective/ competencies. Progress is being observed for the majority of requirements.	NI/1 -Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.
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Section C – Learning and Development

During the planning stage the manager and employee complete the “Learning and development objective”, “How this objective relates to my current job or career aspirations”, and the “Performance Planning” section. During the performance evaluation stage the manager and employee discuss the extent to which the learning objective was achieved. This is recorded in the “Outcome/results/reflection” section.

Learning and Development Objective – What do I need or want to learn? What competency do I need to develop?					
How does this objective relate to my current job, my competency development or my career aspirations?					
PERFORMANCE PLANNING					ONGOING REVIEW AND EVALUATION
ACTION PLAN/DEVELOPMENT ACTIVITIES	WHY Why do this activity? How will this activity support my objective and competency development?	RESOURCE STRATEGIES Remember your learning style when deciding on resources. Resources could be literature, courses, policies, manager, colleagues, mentor etc	BARRIERS What could potentially prevent me from achieving my goals? How will I address them?	TARGET DATE (e.g. 12JAN10)	Outcome/Results/Reflection What did I learn? How did I apply the learning? How did I demonstrate what I have learned? How did I develop my competencies?
1.					
2.					
3.					
4.					
5.					
INTERIM REVIEW (COMMENTS):					

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Section D – Summary Review and Overall Evaluation

Overall Evaluation	<input type="checkbox"/> Needs Improvement <input type="checkbox"/> Progressing <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Exceeds Expectations		
Manager Comments/ Summary			
Employee Comments			
Signatures	Employee Name (please print)	Manager Name (please print)	Date
	Employee Signature	Manager Signature	
	Director Signature (if applicable)		Date

Note: By signing the results section the employee acknowledges having read the results and having discussed them with the manager.