

## PERFORMANCE APPRAISAL – MANAGER'S GUIDELINES

The Performance Appraisal – Manager's Guideline is a document outlining best practices in completing this process, and is complimentary to the Performance Appraisal Policy.

Performance appraisals are an essential tool for evaluating employee performance and providing constructive feedback to enhance their performance. As a Manager at Pembroke Regional Hospital, you have an important role in conducting performance appraisals for your team members. This handbook is designed to provide you with the guidance and tools you need to conduct effective performance appraisals for your employees.

It is vital that our employees' performance is guided by the Hospital's Mission, Vision, and Values, and by any specific driver identified by the Hospital.

**Mission:** We are a regional community hospital committed to delivering a wide range of quality health services. Following Catholic tradition, we will meet the physical, emotional, and spiritual needs of all.

**Vision:** Delivering the safest and highest quality of care to every person, every encounter, every day.

### Values:

- Compassion and Caring
- Excellence and Innovation
- Social and Fiscal Responsibility
- Sacredness of Life
- Mutual Respect
- Community Spirit

### PRH Drivers:

- Quality and Safety
- Working Together
- Financial Stewardship
- Patient and Family Centered Care

The hospital's policy for performance appraisals states that all non-management staff of the hospital will undergo a performance appraisal on an eighteen-month rotation. The appraisal process will be based on the job description and performance standards established for each position within the hospital. The appraisal process will involve a review of the employee's performance over the previous cycle and will include input from the employee and their

supervisor. The appraisal will be used to celebrate accomplishment, identify training and development needs, and to establish performance improvement plans where necessary.

### **Preparing for the Performance Appraisal:**

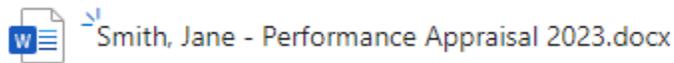
1. Review the employee's job description and performance standards to ensure that you have a clear understanding of their job responsibilities and performance expectations.
2. Gather performance data for the employee, including any performance metrics, feedback from clients or patients, and examples of the employee's work.
3. Prepare a list of discussion and questions points for the appraisal, including the employee's achievements, strengths, areas for improvement, and goals for the upcoming cycle.
4. Schedule a meeting with the employee. Provide them with a blank copy of the performance appraisal form in advance, allowing the Employee to complete their portion of the performance appraisal form.

### **Conducting the Performance Appraisal Meeting:**

1. Begin the appraisal by setting a positive tone and emphasizing the importance of the appraisal process.
2. Review the employee's performance over the previous cycle, highlighting their achievements and contributions to the hospital.
3. Provide constructive feedback on the employee's strengths and areas for improvement. Be specific and provide examples to support your feedback.
4. Discuss the employee's goals for the upcoming cycle and how they can improve their performance.
5. Encourage the employee to provide feedback and comments on their performance.
6. Complete the performance appraisal form, including ratings and comments on the employee's performance. Please see the appraisal form steps below.
7. Discuss any performance improvement plans or training and development needs identified during the appraisal.
8. Conclude the appraisal meeting by summarizing the discussion points.

## Performance Appraisal Form Instructions:

1. Manager downloads Performance Appraisal template from <https://www.pemreghos.org/staffresources>
2. Manager opens OneDrive: <https://theottawahospital-my.sharepoint.com/>
3. Manager creates a “Performance Appraisal” folder in OneDrive. Use this folder to save performance appraisals.
4. Manager uploads Performance Appraisal template to their OneDrive “Performance Appraisal” folder. Rename the document file to be the employee’s “<LAST NAME>, <FIRST NAME>, Performance Appraisal <YEAR>”.
  - a. For example,



5. Open the Word document, then click “Share” to share with the employee that is identified on the file name. Now, the employee has access to the contents of the documents.
  - a. Caution: Do not share the folder. Rather, share the file.
6. Employee completes sections 1,2,3 & 5. Employee send an email notifying the Manager that they have completed their portion, to proceed to the next step.
7. Manager reviews submission and adds comments to sections 2 & 6.
8. Manager and employee meet to discuss the appraisal. If applicable, the Manager and Employee discuss and develop an action plan together in section 4.
9. Manager is to determine the final rating for each competency, as well as final rating overall.
10. Manager downloads a PDF copy of the final performance appraisal.
11. Manager forwards a copy of the final Appraisal to your Human Resources Consultant by email.
12. Employee retains a copy of the performance appraisal to track and monitor their progress.
13. Human Resources placed copy of the final Appraisal in their personnel file

## Following Up on the Performance Appraisal:

1. Schedule a follow-up meeting with the employees to review their progress on their goals and performance improvement plans, if applicable.
2. Provide ongoing feedback and coaching to the employee throughout the process to help them improve their performance.

3. Document all performance-related discussions and actions taken in the employee's personnel file.

### **Conclusion:**

Performance appraisals are an important tool for evaluating employee performance and identifying opportunities for improvement. As a manager at Pembroke Regional Hospital, it is your responsibility to conduct effective performance appraisals for your team members. This handbook provides you with the guidance and tools you need to conduct successful performance appraisals that enhance employee performance and contribute to the success of the hospital.