

## PATHWAYS ABILITIES SOCIETY

### **PROCEDURE: PERFORMANCE EVALUATION**

**Applies to:** All Personnel, Board of Directors and Volunteers

Original Effective Date: 1993

Effective Date: February 26, 2024

Replaces Procedure Dated: January 29, 2024

### **Employee Probation Reports**

1. The supervisor or manager:

- Makes the employee aware of the probation evaluation date and time.
- Completes the probation report in the Excel document. Probationary employees who work in more than one area have the probationary report completed by their primary supervisor or manager, who solicits input from the other area supervisors or managers. The other area supervisors or managers may also attend the evaluation meeting.
- Saves it to the employee's evaluation file in the directory, specifying the probation month and year i.e. Smith Probation Report Jun 15 23.
- Notifies the executive director or designate that the probation report has been completed.

2. The executive director or designate reviews, prints and initials the probation report a gives it to the supervisor or manager to review with the employee.

3. Upon completion of the probation evaluation meeting the employee signs the probationary report indicating the content of the report has been reviewed.

The supervisor or manager:

- Signs the probationary report and uploads it to the person's ShareVision and M drive sites. The original is probation report is given to the People and Culture Manager or designate.
- Enters the date of the report in their Employee Information ShareVision list.
- In conjunction with the executive director or designate, monitors and follows-up outstanding Employee File Requirements and probationary period extensions.

4. The People and Culture Manager or designate verifies the document has been uploaded to the appropriate location and returns the probation report to the supervisor. The supervisor gives the report to the employee.

5. If an employee has concerns regarding the evaluation or the process, they follow the Pathways Abilities Society Conflict Resolution procedure.

### **Employee Pre-Probation Completion of a Performance Evaluations**

1. The supervisor or manager:

- Makes the employee aware of the evaluation date and time which occurs prior to the completion of the person's probation period.
- Completes the evaluation in the Excel document. Employees who work in more than one area have the evaluation completed by their primary supervisor or manager who

solicits input from the other area supervisors or managers. The other area supervisors or managers may also attend the evaluation meeting.

- Saves it to the employee's evaluation file in the directory, specifying the Evaluation and year i.e. Smith Final Probation Evaluation Jun 15 23.
- Notifies the executive director or designate that the evaluation report has been completed.

2. The executive director or designate reviews, prints and initials the evaluation and gives it to the supervisor or manager to review with the employee.

3. Upon completion of the evaluation meeting the employee signs the evaluation indicating acceptance or objection.

4. The supervisor or manager:

- Signs the evaluation and uploads the evaluation to the person's ShareVision and M drive sites. The original evaluation is given to the People and Culture Manager or designate.
- Enters the date of the evaluation in their Employee Information ShareVision list.
- Adds the Goals to the ShareVision list.
- In conjunction with the executive director or designate, monitors and follows-up outstanding Employee File Requirements and probationary period extensions.

5. The People and Culture Manager or designate verifies the document has been uploaded to the appropriate location and returns the evaluation to the supervisor. The supervisor gives the report to the employee.

6. The supervisor or manager monitors the actions taken to achieve the person's goals and formerly reviews in the month of June.

7. If an employee has concerns with the evaluation or the process, they follow the Pathways Abilities Society Conflict Resolution procedure.

### **Employee Annual Performance Evaluations**

1. The executive director or designate prepares the employee's evaluation packages coversheet in the month of December. They give the sheet to the supervisors and managers.

2. The supervisor or manager:

- Gives each employee the sheet and makes them aware of the evaluation date and time.
- Completes the evaluation in the Excel document. Employees who work in more than one area have the evaluation completed by their primary supervisor or manager who solicits input from the other area supervisors or managers. The other area supervisors or managers may also attend the evaluation meeting.
- Saves it to the employee's evaluation file in the directory, specifying the year i.e. Smith 2015.
- Notifies the executive director or designate that the evaluation has been completed.

3. The executive director or designate reviews, prints and initials the evaluation and gives it to the supervisor or manager to review with the employee.

4. Upon completion of the evaluation meeting the employee signs the evaluation indicating acceptance or objection.

The supervisor or manager:

- Signs both copies of the evaluations if relevant and uploads the evaluations to the person's ShareVision and M drive sites. The original evaluation is given to the People and Culture Manager or designate.
- Enters the date of the evaluation in their Employee Information ShareVision list.
- Adds the Goals to the ShareVision list.

5. The People and Culture Manager or designate verifies the document has been uploaded to the appropriate location and returns the probation report to the supervisor. The supervisor gives the report to the employee.

6. The supervisor or manager monitors the actions taken to achieve the person's goals and formerly reviews in the month of June.

7. If an employee has concerns with the evaluation or the process, they follow the Pathways Abilities Society Conflict Resolution procedure.

### **Person's Receiving Service/ Social Ventures Performance Evaluations**

1. The area supervisor or manager prepares the evaluation packages (job description, Confidentiality form, etc.) in the month of October. They give the packages and blank evaluations to the support workers.

2. The person is made aware of the evaluation time and date.

3. The support worker:

- Completes the evaluation and reviews with the employee. Employment or other goals are identified and documented.
- Reviews the job description and any of the other employment-related documents with the person and has the person initial, sign and date the annual Social Ventures Form Review form.

4. Upon completion of the evaluation meeting:

- The employee signs the evaluation indicating acceptance or objection.
- The support worker signs the evaluation confirming the completion and review and copies the documents and provides the person with a copy.

5. The support worker gives the originals to the supervisor or manager who places them in the employee's personnel file.

6. The supervisor or designate schedules a time to review and document the status of the employment goals throughout the year.

7. If the person has concerns regarding the evaluation or the process, they follow the Pathways Abilities Society Conflict Resolution procedure.

**Board of Directors Performance Evaluations**

1. The executive director provides the board of directors with individual self-evaluations to complete and return in the month of June.
2. The executive director compiles the data and reports the results to the board of directors.
3. The board of directors addresses the specific areas requiring development or improvement.

**Volunteer Performance Evaluation Reports**

Refer to the Volunteer and Practicum student procedure.