

## Onboarding - HR toolkit

### 1. Conducting annual performance reviews.

- An annual review gathers the most useful data when objective criteria is used to rate performance.
- Clarifying performance goals using the Performance Review: Supervisor Assessment template will ensure employers and employees are working toward a common goal.
- Using the Self-Assessment template as a guide, encourage employees to reflect on their performance, noting areas of success and identifying goals for the future.
- Consider your budget for salary increases using the Performance-Based Salary Assessment template.

### 2. Creating performance development plans

- Using the Employee Performance Development Plan can help you provide clear direction and support to your employees on how to improve performance.

### 3. Improving with professional development

- Professional development programs improve employees' knowledge, skill set, and job satisfaction, resulting in higher employee retention.
- Using the Sample Professional Development Policy template as a guide, draft a company policy.
- Keep in mind budget allocation for funding employee professional development.
- BC Family Doctors offers MOAs and office staff access to billing supports and resources.

## PERFORMANCE REVIEW - PROBATION PERIOD

EMPLOYEE INFORMATION			
<b>Name:</b>		<b>Date:</b>	
<b>Position:</b>		<b>Supervisor's name:</b>	
<b>Review Period (ex. Jan - Mar 2022):</b>			

Goals:		
SMART (Specific, Measurable, Achievable, Relevant, Time Bound) goals		
<b>Activities:</b>	<b>Target Date:</b>	<b>Completed:</b>
List of activities that you will undertake to achieve the goal		
Results/Comments:		
Employee completes this section for probation period goal review meeting with supervisor		

### PART 1: PERFORMANCE ASSESSMENT

**Goal-Achievement:** Extent to which employee has achieved goal, as outlined above.

Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Job knowledge:** Understands and performs the requirements of the position description.

Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Technical ability:** Demonstrates the technical knowledge required for the position.

Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

**Quality of work:** Completes all responsibilities to our standards of excellence.

- Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Quantity of work:** Completes the expected amount of work with minimum follow-up.

- Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Values:** Demonstrates our organizational values and seeks opportunities to practice values alignment.

- Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Approach:** Displays enthusiasm, self-motivation, cooperation, responsiveness and a sincere interest in their position and in our team, members, and stakeholders. Maintains high level of engagement.

- Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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**Other:** [INSERT HERE]

- Does not meet expectations     Meets expectations     Exceeds expectations

Comments:

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PART 2: OVERALL ASSESSMENT

- Exceeds overall expectations.
- Meets overall expectations.
- Does not meet overall expectations.

Supervisor comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employee comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By signing, both parties acknowledge that they have read and discussed the contents of this performance review form.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

## PERFORMANCE REVIEW - SUPERVISOR ASSESSMENT

EMPLOYEE INFORMATION			
<b>Name:</b>		<b>Last review date:</b>	
<b>Position:</b>		<b>Today's date:</b>	
<b>Supervisor's name:</b>		<b>Start date in current role:</b>	

### PART 1: OVERVIEW

Highlight key accomplishments, successes, and strengths of the employee, as well as any areas of growth for future development.

### PART 2: PERFORMANCE ASSESSMENT

Based on the information provided by the employee and your own personal assessment, measure the employee's degree of skill and competence in the key areas of the position below. Use the following scale:

0	No skill or competence.
1	Little or limited skill and competence.
2	Emerging skill and competence.
3	Experienced and fully competent.
4	Sustained outstanding performance and contribution in the area.
5	Has specialized skills and competencies. Can serve as a mentor or coach in this field.

CORE COMPETENCIES	0	1	2	3	4	5
<b>Approach to Work</b> <ul style="list-style-type: none"> <li>Demonstrates initiative, flexibility, adaptability and resourcefulness</li> <li>Welcomes new ideas and displays a creative and innovative approach to their work</li> <li>Sets goals, creates and implements action plans, monitors progress, and evaluates results</li> <li>Adeptly manages competing tasks and uses time efficiently and effectively</li> </ul>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
<i>Comments:</i>						

[ORGANIZATION LOGO]

<p><b>Job Knowledge &amp; Quality of Work</b></p> <ul style="list-style-type: none"> <li>• High-degree of relevant and current job knowledge and skill</li> <li>• Consistently produces accurate, thorough, high-quality work in a timely manner</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						
<p><b>Judgement &amp; Decision-Making</b></p> <ul style="list-style-type: none"> <li>• Demonstrates independent thinking and effective problem-solving skills</li> <li>• Makes clear, consistent, transparent and timely decisions after contemplating various available courses of action</li> <li>• Exercises sound judgment in the best interests of the organization</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						
<p><b>Communication &amp; Interpersonal Skills</b></p> <ul style="list-style-type: none"> <li>• Expresses themselves clearly and professionally both verbally and in writing</li> <li>• Displays high emotional intelligence; uses tact and diplomacy in dealing with sensitive, complex and confidential situations</li> <li>• Effectively works with their colleagues in the leadership team to ensure organizational success</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						
<p><b>Safety Awareness &amp; Demonstration</b></p> <ul style="list-style-type: none"> <li>• Builds and promotes a culture of health and safety in the workplace</li> <li>• Attends to health and safety issues effectively and efficiently</li> <li>• Implements and enforces best practices in health and safety within the workplace</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						
<p><b>Personal Leadership</b></p> <ul style="list-style-type: none"> <li>• Models core qualities such as honesty, integrity, resilience, and confidence</li> <li>• Takes responsibility for personal actions, performance, and health</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						
<p><b>People Leadership (FOR MANAGERS ONLY)</b></p> <ul style="list-style-type: none"> <li>• Takes responsibility for the success of the organization</li> <li>• Champions positive working relationships with colleagues, staff, and external stakeholders</li> <li>• Acts as an ambassador of the organization; upholds the values and mission</li> <li>• Demonstrates pride and enthusiasm to the team and promotes cooperation, fairness, and equity</li> </ul>	<input type="checkbox"/>					
<i>Comments:</i>						

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

<p><b>People Management (FOR MANAGERS ONLY)</b></p> <ul style="list-style-type: none"> <li>• Displays interest, concern, and respect for their staff and their staff's development</li> <li>• Provides direction, vision, clarity, and support to their team</li> <li>• Delegates appropriately to fully utilize their staff to accomplish unit goals</li> <li>• Gives recognition and acknowledgement to staff for their achievements</li> </ul>	<input type="checkbox"/>					
<p><i>Comments:</i></p>						
<p><b>Task Management (FOR MANAGERS ONLY)</b></p> <ul style="list-style-type: none"> <li>• Establishes clear roles, responsibilities, priorities and performance targets for staff</li> <li>• Monitors, assesses, and reviews staff performance while providing opportunities for training and development, as appropriate</li> <li>• Strives for high quality performance and takes initiative to seek improvement in outputs and efficiencies</li> </ul>	<input type="checkbox"/>					
<p><i>Comments:</i></p>						
<p><b>Task Leadership (FOR MANAGERS ONLY)</b></p> <ul style="list-style-type: none"> <li>• Able to translate the strategic goals and priorities of the organization into an achievable and measurable operational plan for their unit</li> <li>• Makes clear, consistent, transparent and timely decisions</li> <li>• Focuses on the 'service recipient' of their unit</li> <li>• Displays effectiveness, assertiveness and persistence in the pursuit of the goals of their unit</li> <li>• Able to identify gaps in knowledge or capacity and seek the appropriate support and/or resources</li> </ul>	<input type="checkbox"/>					
<p><i>Comments:</i></p>						

**PART 3: REVIEW OF PREVIOUS GOALS**

Review the personal leadership, program development (if applicable), and wellness goals established at the previous Performance Review. Reflect on how these goals are being realised.

Previous Goal	Comments Regarding Results

**PART 4: PERSONAL LEADERSHIP GOALS**

With the employee, mutually develop their personal leadership goals for the coming year referencing information from both your assessment and their Self-Assessment. Include details regarding follow-up, timelines, etc.

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

**Goal 1:**

**Goal 2:**

**Goal 3:**

**PART 5: DISCUSSION WITH EMPLOYEE**

Summary/Highlights:

**PART 6: CLOSING COMMENTS & REFLECTIONS**

Closing reflections:

**Acknowledgments - Signatures**

**Employee Name:**

- I would like to attach my Self-Assessment to this document
- I will be providing my overall comments which I would like to be attached to this document

**Signature:**

\* I have read and discussed this evaluation with my supervisor. My signature means that I have been advised on my performance, but does not necessarily imply that I agree with the contents of this review.

Supervisor name:

Signature:

Date of next review:

*Distribution: Original to be kept in the employee's personnel file, and a copy of this document to be provided to the employee. Attach the employee's Self-Assessment and overall comments to this document (if applicable).*

**NOTE:** Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

## PERFORMANCE REVIEW - SELF-ASSESSMENT

EMPLOYEE INFORMATION			
Name:		Last review date:	
Position:		Today's date:	
Start date at [ORGANIZATION]:		Start date in current role:	

### PART 1: SELF-REFLECTION

Review your job description (attached). Describe any changes to your role in the past year and how you see your position evolving in the coming year.

What aspects of your position do you find most challenging, and/or wish you felt more confident, and/or had more support and/or training in?

What aspects of your position do you enjoy the most and get the most satisfaction from?

When reflecting upon the past year, which of your achievements are you most proud of and why?

Knowing how you work and your preferred work style, what support, feedback, or conditions would allow you to be most effective in your role?

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

List the professional development activities you participated in last year that you found most valuable and explain why. What professional development activities would you like to pursue in the coming year and why?

Review the goals set for yourself during your last review. Which goals did you meet? Which goals fell short and why?

## PART 2: SELF-ASSESSMENT

Assess your degree of skill and competence in the key areas of the position below. Use the following scale:

0	No skill or competence.
1	Little or limited skill and competence.
2	Emerging skill and competence.
3	Experienced and fully competent.
4	Sustained outstanding performance and contribution in the area.
5	Have specialized skills and competencies. Can serve as a mentor or coach in this area.

CORE COMPETENCIES	0	1	2	3	4	5
<b>Approach to Work</b> <ul style="list-style-type: none"><li>Demonstrate initiative, flexibility, adaptability, and resourcefulness.</li><li>Welcome new ideas and display a creative and innovative approach to my work.</li><li>Set goals, create and implement action plans, monitor progress, and evaluate results.</li><li>Adeptly manage competing tasks and use time efficiently and effectively.</li></ul>	<input type="checkbox"/>					
<b>Job Knowledge &amp; Quality of Work</b> <ul style="list-style-type: none"><li>High-degree of relevant and current job knowledge and skill.</li><li>Consistently produce accurate, thorough, high-quality work in a timely manner.</li></ul>	<input type="checkbox"/>					
<b>Judgement &amp; Decision-Making</b> <ul style="list-style-type: none"><li>Demonstrate independent thinking and effective problem-solving skills.</li><li>Make clear, consistent, transparent and timely decisions after contemplating various available courses of action.</li><li>Exercise sound judgment in the best interests of the organization.</li></ul>	<input type="checkbox"/>					
<b>Communication &amp; Interpersonal Skills</b> <ul style="list-style-type: none"><li>Express myself clearly and professionally both verbally and in writing.</li><li>Display high emotional intelligence; use tact and diplomacy in dealing with sensitive, complex and confidential situations.</li></ul>	<input type="checkbox"/>					

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

<ul style="list-style-type: none"> <li>Work effectively with colleagues in the leadership team to ensure organizational success.</li> </ul>						
<b>Safety Awareness &amp; Demonstration</b> <ul style="list-style-type: none"> <li>Build and promote a culture of health and safety in the workplace.</li> <li>Attend to health and safety issues effectively and efficiently.</li> <li>Implement and enforce best practices in health and safety within the workplace.</li> </ul>	<input type="checkbox"/>					
<b>Personal Leadership</b> <ul style="list-style-type: none"> <li>Model core qualities such as honesty, integrity, resilience, and confidence.</li> <li>Take responsibility for personal actions, performance, and health.</li> </ul>	<input type="checkbox"/>					
<b>People Leadership (FOR MANAGERS ONLY)</b> <ul style="list-style-type: none"> <li>Take responsibility for the success of the organization.</li> <li>Champion positive working relationships with colleagues, staff and external stakeholders.</li> <li>Act as an ambassador of the organization; upholds the values and mission.</li> <li>Demonstrate pride and enthusiasm to the team and promote cooperation, fairness, and equity.</li> </ul>	<input type="checkbox"/>					
<b>People Management (FOR MANAGERS ONLY)</b> <ul style="list-style-type: none"> <li>Display interest, concern and respect for my staff and their development.</li> <li>Provide direction, vision, clarity, and support to my team.</li> <li>Delegate appropriately to fully utilize my staff to accomplish unit goals.</li> <li>Give recognition and acknowledgement to staff for their achievements.</li> </ul>	<input type="checkbox"/>					
<b>Task Management (FOR MANAGERS ONLY)</b> <ul style="list-style-type: none"> <li>Establish clear roles, responsibilities, priorities, and performance targets for staff.</li> <li>Monitor, assess, and review staff performance while providing opportunities for training and development, as appropriate.</li> <li>Strive for high quality performance and take initiative to seek improvement in outputs and efficiencies.</li> </ul>	<input type="checkbox"/>					
<b>Task Leadership (FOR MANAGERS ONLY)</b> <ul style="list-style-type: none"> <li>Translate the strategic goals and priorities of the organization into achievable and measurable operational plans for my unit.</li> <li>Make clear, consistent, transparent and timely decisions.</li> <li>Focus on the service recipient of my unit.</li> <li>Display effectiveness, assertiveness and persistence in the pursuit of the goals of my unit.</li> <li>Identify gaps in knowledge or capacity and seek the appropriate support and/or resources.</li> </ul>	<input type="checkbox"/>					

**PART 3: PERSONAL LEADERSHIP GOALS**

Identify three (3) goals for next year that you would like to propose for yourself. Focus these goals on developing your skills, knowledge base, work approach, leadership style, etc. as they relate to your position. These goals will be discussed and finalized at your performance review meeting.

<p><b>Goal 1:</b></p>
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NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

**Goal 2:**

**Goal 3:**

**PART 4: CLOSING COMMENTS & REFLECTIONS**

Is there anything you would like to comment or elaborate on in your Self-Assessment? Is there anything else that you think would be important to share, or have be part of the discussion during your performance review meeting?

Closing reflections:

## PERFORMANCE-BASED SALARY ASSESSMENT (CONFIDENTIAL)

EMPLOYEE INFORMATION			
<b>Name:</b>		<b>Last review date:</b>	
<b>Position:</b>		<b>Today's date:</b>	
<b>Supervisor's name:</b>		<b>Start date in current role:</b>	

### PART 1: PERFORMANCE ASSESSMENT SCORE

After evaluating the employee's degree of skill and competence using the **Performance Review – Supervisor Assessment**, total the number of points awarded. You will get a score out of 50.

Performance Assessment Total Score	/50
Supervisor notes:	

### PART 2: PERFORMANCE-BASED SALARY INCREASE ASSESSMENT

Use the Performance Assessment Total Score and the employee's current placement in their salary range to determine the appropriate salary increase.

Illustrative Salary Progression Matrix Example = 2.5% Budgeted Increase			Position on Range		
			Development	Median	Above
<b>Performance Rating</b>	50	Highest	5.0%	4.5%	3.5%
	40-50	High	4.5%	3.5%	3.0%
	30-40	Middle	3.5%	3.0%	2.5%
	20-30	Low	2.0%	1.5%	1.0%
	>20	Lowest	0%	0%	0%
<i>% Increase cannot exceed the salary range maximum</i>					

### PART 3: PERFORMANCE-BASED SALARY PROGRESSION RECOMMENDATION

Based on the information in Part 1 and Part 2, detail your performance-based salary recommendation and rationale.

<b>Employee's Current Salary:</b>	\$
<b>Salary Progression Recommendation:</b>	%
Rationale:	

## EMPLOYEE PERFORMANCE DEVELOPMENT PLAN FORMS [SAMPLES]

### EMPLOYEE INFORMATION

<b>Name:</b>		<b>Review date:</b>	
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SECTION 1: PERFORMANCE REVIEW						
<b>Major tasks</b> (from job description)  <i>(What do I do?)</i>	<b>Performance rating</b> <i>(How am I doing?)</i>  n/a = not applicable 1 = needs development 2 = satisfactory 3 = above average 4 = outstanding					<b>Comments</b>  <i>(Include feedback)</i>
	n/a	1	2	3	4	
Coordinates patient care through the clinic – waiting room, prep procedures, exam room, etc.						
Answers enquiries by phone and in person in a helpful, respectful, and efficient manner.						

Maintains appointment schedule and manages recalls.						
Maintains EMR efficiently, accurately and in accordance with [YOUR CLINIC NAME] policy. This includes maintaining the patient chart.						
Ensures exam rooms are stocked appropriately and ensures that they are ready for next patient.						
Ensures patient confidentiality.						
Cleans and sterilizes materials and instruments following [YOUR CLINIC NAME] policy.						
Performs patient prep procedures and documents findings on the patient record.						

Performs billing procedures for multiple payers (MSP, ICBC, WCB, RCMP, etc.) and applies and collects non-insured fees where applicable.						
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**SECTION 2: PERFORMANCE REVIEW**

**PERFORMANCE RATINGS**

n/a = not applicable  
1 = needs development  
2 = satisfactory  
3 = above average  
4 = outstanding

<b>Skills</b>	<b>n/a</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>Skills</b>	<b>n/a</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
Work quality (including accuracy)	<input type="checkbox"/>	Solves problems	<input type="checkbox"/>								
Work volume	<input type="checkbox"/>	Demonstrates cost awareness	<input type="checkbox"/>								
Demonstrates community health perspective in work	<input type="checkbox"/>	Demonstrates good judgment and decision making	<input type="checkbox"/>								
Communicating with other staff	<input type="checkbox"/>	Shows initiative	<input type="checkbox"/>								
Communicating with patients and families	<input type="checkbox"/>	Organized	<input type="checkbox"/>								

Writing	<input type="checkbox"/>	Understands when to refer questions to a doctor or others	<input type="checkbox"/>								
Is a team player	<input type="checkbox"/>										
<p>Employees comments – use this space to provide feedback on how the employer can support you in improving your performance. Always include feedback to support 1 and 4 ratings.</p>											

Evaluator: \_\_\_\_\_

Date: \_\_\_\_\_

Evaluator: \_\_\_\_\_

Date: \_\_\_\_\_

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

**SECTION 3: EMPLOYEE DEVELOPMENT PLAN**

Employee \_\_\_\_\_ For period \_\_\_\_\_ to \_\_\_\_\_

Employee Aspirations and Goals (5 year outlook)

Employee Education Plan (2 year outlook)

Employee Development Plan (what experience would you like to gain in the next 2 years?)

Approval

\_\_\_\_\_

Employee Signature

\_\_\_\_\_

Date

\_\_\_\_\_

HR Director Signature

## SAMPLE PROFESSIONAL DEVELOPMENT POLICY

[CLINIC NAME] is committed to creating a work environment that supports continued learning. Where possible, work-related courses or training that will enhance or upgrade the knowledge and skills of employees will be provided or supported, which will increase employees' ability to provide excellent service.

To apply for funding or time away from work, employees must send a written request and proposal to [YOUR MANAGER/HR DEPARTMENT] outlining:

- The name and location of the course or training program.
- The time away from work required to attend the course or training program.
- The cost of the course or training program.
- The financial contribution requested from [CLINIC NAME] to facilitate attending the course or training program.
- The intended benefit to the employee and to [CLINIC NAME] as a result of taking the course and/or training.

An employee's years of service, the potential benefits to [CLINIC NAME], succession considerations, and mentoring possibilities will be measured when reviewing applications for professional development funding. These considerations will be made within the context of the current budget for [CLINIC NAME].

All requests for professional development funding will be reviewed on a case-by-case basis.