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| **Annual**  **Performance**  **Appraisal**  ***Manager / Specialist*** |
| Employee’s Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date in Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date of Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Completed By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Section One: Evaluating Competencies

**Only include comments and/or examples to support your ratings if ranked as EE or RI.**

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| **Exceeds Expectations**  **(EE)** | **Achieves Expectations**  **(AE)** | **Requires Improvement**  **(RI)** | | | |
| Performance and results are consistently beyond expectations set for the individual as well as the objectives and requirements of the position in most areas. Seeks additional responsibility. | Performance and results consistently meet expectations set for the individual as well as the objectives and requirements of the position and at times exceeds them. Takes initiative. | Performance and results do not consistently meet expectations set for the individual as well as the objectives and requirements of the position. May require a moderate degree of additional training or guidance to achieve objectives and requirements. | | | |
| **Core Competency** | | | **EE** | **AE** | **RI** |
| **Customer Focus:** dedicated to meeting the expectations and requirements of internal and external customers; gets first-hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect. | | |  |  |  |
| **Communication:** **Ensures information is effectively exchanged with others; s**hares ideas and information with appropriate customers/stakeholders, practices attentive and active listening, ensures that regular, consistent communications take place, expresses ideas clearly and concisely in writing, expresses oneself clearly in conversation and interaction with others. | | |  |  |  |
| **Teamwork:** Collaborating and cooperating to get the job done; Values the input and know-how of other team members, asks for help, when needed, offers help to other team members, when needed, builds trust and respect among fellow team members, takes actions that demonstrate considerations for the feelings and needs of others, works with other team members toward a common goal. | | |  |  |  |
| **Personal Credibility: Demonstrates concern that one be perceived as responsible, reliable, and trustworthy; d**emonstrates honesty, keeps commitments, behaves in a consistent and ethical manner, takes ownership of work and one’s own actions, acts reputably in relationships with others, models CSMLS values, builds trust and credibility by demonstrating consistency between words and actions. | | |  |  |  |

**Comments/Supporting Examples:**

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| **Exceeds Expectations**  **(EE)** | **Achieves Expectations**  **(AE)** | **Requires Improvement**  **(RI)** | | | |
| Performance and results are consistently beyond expectations set for the individual as well as the objectives and requirements of the position in most areas. Seeks additional responsibility. | Performance and results consistently meet expectations set for the individual as well as the objectives and requirements of the position and at times exceeds them. Takes initiative. | Performance and results do not consistently meet expectations set for the individual as well as the objectives and requirements of the position. May require a moderate degree of additional training or guidance to achieve objectives and requirements. | | | |
| **Job Specific Competency** | | | **EE** | **AE** | **RI** |
| **Coaching:** Works to improve and reinforce performance of others. Facilitates their skill development by providing clear behaviourally specifically performance feedback and making or eliciting specific suggestions for improvement in a manner that builds confidence and maintains self-esteem. Creates an environment that allows staff to feel motivated to work, interact and establishes trust. | | | **NA** | **NA** | **NA** |
| **Innovation: Develops, sponsors, or supports the introduction of new and improved methods, products, procedures, or technologies; d**evelops new methods or approaches, sponsors the development of new services, methods, or procedures, proposes new approaches, methods, or technologies, develops better, faster, or less expensive ways to do things, works cooperatively with others to produce innovative solution. | | |  |  |  |
| **Functional/Technical Skills:** Has the functional and technical knowledge and skills to do the job at a high level of accomplishment. | | |  |  |  |
| **Problem Solving:** Anticipates problems; sees how a problem and its solution will affect other units; gathers information before making decisions; weighs alternatives against objectives and arrives at reasonable decisions;  adapts well to changing priorities, deadlines and directions; works to eliminate all processes which do not add value; is willing to take action, even under pressure, criticism or tight deadlines; takes informed risks; recognizes and accurately evaluates the signs of a problem; analyzes current procedures for possible improvements; notifies supervisor of problems in a timely manner. | | |  |  |  |
| **Financial Awareness:** Having the skill, knowledge, and ability to perform activities with a financial impact in compliance with relevant CSMLS and external requirements while maintaining fiscal integrity. Understands that their actions do have a financial impact on the CSMLS and that they have a duty to perform those actions in a competent manner. Keep appropriate records of functional areas spending. | | | **NA** | **NA** | **NA** |

### Comments/Supporting Examples:

## Section Two: Culture Discussion

The CSMLS has distinct aspects to its culture. We hire & promote diverse people, with the skills to fit our varied roles, but we all share a common set of ideals and principles. These principles help us build a great organization. They help us create a great member experience and they help us create a great place to work.

We have been working on focusing our attention on the follow culture principles over the past year. To continue to emphasize our commitment to these principles we now would like you to think about what you do to foster these principles.

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| **Corporate Culture Competency** |
| **Respect Everyone:**  A healthy work environment is the only work environment we want here. That isn’t possible without respect, where different people and different perspectives are valued. Good ideas come from anyone and anywhere. Be open and always assume good intent. Tolerate nothing less from yourself and each other. |
| **Aim for Awesome:**  We are passionate about achieving great results. This passion should be infectious and we should feed off of each other’s enthusiasm. WE will never apologize for having high expectations of ourselves and each other. |
| **Always Adapt:**  Without change, we can’t grow and we can’t get better. So we embrace change, which means we need to adapt to what’s going on in the profession we serve, the association and regulatory industries we operate in, and changes within our membership. We keep an eye to the future to make changes proactively |
| **Be Dependable:**  Our success is never the result of a single individual. Everyone is counted on to do their part. Do your part and do it well. Leverage the strengths of others and support one another. Be accountable for your mistakes as this is how we learn. Ask for help and give help. |
| **Keep Learning:**  **We believe that when you grow, we grow. Everyone has greatness in them and it is our collective responsibility to nurture that. We want enquiring minds that are willing to learn and are open to what may be. For some this may mean formal education. For others it may be reading and sharing articles. However it manifests, we want learning, growth and development to be omnipresent in the organization and everyone’s responsibility.** |
| **Our Members are Everything:**  **Without members we don’t exist. It’s that simple. Seek to understand our members so that we can stay relevant and deliver value. Look to create positive interactions and forge relationships with our members that will last.** |

**Culture Discussion:**

1. Reflecting on your own performance, what culture principle is your strongest or which do you foster/demonstrate the most? What behaviours do you demonstrate that support this principle?

1. On the flip side, which principle is your weakest? What changes to your own behaviour could you make to increase your commitment to this principle?
2. What have you done to foster these principles in your team?

**Section Three: Achievements**

1. Attach employee’s key objectives from the previous year and or six month check.
2. Indicate any key achievement(s) the employee has accomplished during this review period.

## Section Four: Challenges & Opportunities

## Indicate any difficult or challenging work or work related situation the employee encountered during this review period.

## List any areas of work performance, skills/abilities or professional behaviour the employee needs improvement in.

## Section Five: Goals and Development Plan for Upcoming Year\*

1. Review Goals previously set
2. Indicate which goals have been achieved & which have not
3. Indicate why goals have not been achieved & what resources are needed (if applicable)

These objectives can be the development of existing/new skills as well as appointment on new projects/assignments within or outside of their existing position.

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| **Culture (Behaviour) Goals (based on our 6 elements of culture)** | **Completion Date** | **Achieved** | **Not Achieved** |
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| **Performance Goals** | **Completion Date** | **Achieved** | **Not Achieved** |
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| **Job Tasks/Milestones** | **Completion Date** | **Achieved** | **Not Achieved** |
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\*This section should be copied and used for the:

* Six month check in conversation & goal check
* Following year’s annual performance appraisal

**Section Six: Overall Summary & Sign Off**

**Employee’s Comments:**

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*Employee’s Signature Date*

**Manager’s Comments:**

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*Manager’s Signature* *Date*

**Next Level Review:**

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*Next Level Signature*