

Section: Human Resources (HR)**Subject:** Compensation and Benefits**Legislation:****Effective:** June 3, 1985**Revision:** March 14, 1995; August 1, 2003 (reformatted); March 18, 2005; April 20, 2007; April 11, 2008; September 1, 2016 (reformatted)**APPROVED:** _____**President and CEO**

POLICY

The policy of the Board of Governors is for SAIT to use an objective performance planning and review system which assists employees in improving their job performance by establishing performance objectives.

PROCEDURE

GOVERNING PRINCIPLES

1. This procedure applies to all SAIT employees.
2. The Performance Planning Cycle incorporates planning for performance, establishing personal development plans, monitoring and motivating performance, and reviewing performance progress throughout the performance cycle. At least once annually, the results are summarized, discussed, documented and filed.

PROCEDURE

A. Planning

1. The supervisor and the employee shall work together to:

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- a) Identify relationships among SAIT's goals, school/department objectives, job responsibilities and performance expectations. Inputs to this process include position descriptions and institutional documents.
- b) Identify and define performance objectives, strategies, timelines and success measures.
- c) Produce a planning document which details expectations and objectives related to work performance and career path information, including resources and opportunities available for professional development.

B. Monitoring and Motivating

1. Throughout the performance cycle, the supervisor shall:
 - a) Use various techniques and information sources to assess progress relative to the employee's performance plan. For instructors, appropriate sources of information for this assessment may include but are not limited to:
 - i) Observation of the performance within lab and classroom settings.
 - ii) Student's feedback (for example, SIR II reports).
 - iii) Peer review.

The instructor shall be given prior knowledge of the methods used to gather information from such sources.

- b) Create a motivating environment by providing ongoing feedback to the employee that encourages and supports professional development.
- c) Coach the employee on performance issues.

C. Work Progress Review

1. Through regular discussions, the supervisor shall work with the employee to review and assess progress on the performance plan. These discussions will provide opportunities for both the supervisor and the employee to:

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- a) Offer feedback on progress.
- b) Clarify the performance plan.
- c) Address problems related to performance.
- d) Recognize and celebrate successes.
- e) Confirm and agree on any changes to priorities.
- f) Reshape the performance plan if necessary.

D. Summary Review

1. On an annual basis, the supervisor will complete a Performance Planning and Review (PPR) form, for discussion with the employee. A Performance Planning and Review Guidelines document is provided to assist with planning and timelines.
2. The summary review will include:
 - a) Review and assessment of the employee's performance;
 - b) Feedback on successes and areas for improvement;
 - c) Plans for future professional development; and
 - d) Performance issues to be carried forward into the next year's performance plan.
3. The employee shall sign the PPR, acknowledging that the employee has been advised of its contents. If the employee refuses or is unavailable to initial the document, the person responsible for the summary shall note this on the summary document.
4. The employee may submit a written response to the employee's supervisor. This written response will become part of the PPR.
5. The employee shall be provided with a signed copy of the completed PPR form after it has been signed by the dean, director or vice president.
6. The original copy of PPR is forwarded to Employee Services for inclusion in the employee's personal file.

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POLICY/PROCEDURE REFERENCE

HR.1.3 Performance Planning and Review policy

PROCEDURE

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