

Performance Management Planning and Evaluation Tool
Confidential when completed

PERFORMANCE EVALUATION

Employee Name:

Karen Smith

Position Title:

Health Inspector

Manager's Name/Title:

Leslie Porter, Manager, Healthy Environments

Review Period From (Month/Year) to (Month/Year):

January 2009- December 2009

Rating Scale

A numeric and letter rating scale with corresponding descriptors has been provided. Choose the rating scale that best represents the culture of the organization and use it consistently throughout the document.

EE / 4	Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.
ME / 3	Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.
P / 2	Progressing Fulfilled some of the requirements of the objectives/competencies. Progress is being observed for the majority of requirements.
NI / 1	Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.

The profiled proficiency levels of the competencies and the 'Meets Expectations' rating represent the performance expected of a fully-functional individual who is experienced in his or her role. An individual who is new to his or her role and who is performing at an acceptable level, may receive an evaluation that reflects their development towards an expected proficiency level. They may receive a competency rating or an overall rating of 'Progressing' a reflection of their continued growth and development in the role. This is normal and expected.

Employee Name:	Karen Smith
Planning Meeting Date:	
Interim Review Date:	
Performance Evaluation Date:	

Performance Management Planning and Evaluation Tool

Section A – Performance Planning and Review

During the planning stage the manager and employee identify the performance objectives (what) and key indicators and target completion dates. See: Sample – Performance Management Planning and Evaluation Tool for Public Health for an example. During the ongoing review and feedback stage, the manager documents any change to the plan.

During the performance evaluation stage, the manager and employee discuss the extent to which each objective was demonstrated and record the outcome/results.

PERFORMANCE PLANNING			ONGOING REVIEW AND EVALUATION			
PERFORMANCE OBJECTIVES (Expectations of what is to be achieved)		KEY INDICATORS (Expectations of how it will be done)	TARGET DATE (e.g. 12JAN10)	INTERIM REVIEW (Comments)	OUTCOME/RESULTS/EXAMPLES (Review outcomes to demonstrate what was achieved and how competencies were demonstrated)	RATING
1.	Inspect and re-inspect 100% of food premises in assigned geographic area according to Food Premises Regulations and Food Safety Protocol and document using new tablets.	<p>Accurate and consistent use of tablets.(Public Health Science, Communication)</p> <p>Able to apply new food safety protocols in all situations.(Public Health Science & Assessment & Analysis)</p> <p>Charges laid only after infractions and steps to correct are explained in appropriate language, and understood by food premise owners (Communication, Diversity and Inclusiveness)</p>	Inspections to be completed according to schedules outlined in protocols. All to be completed by December, 2009	Objectives on target	<p>New technology of tablets learned and consistently applied. Problem-solved glitches. Entered documentation on tablet that was easy to comprehend and read when downloaded to source for reference later.(Communication)</p> <p>All permanent food premises inspected according to protocol schedules. All premises receiving complaints were re-inspected, as well as those requiring re-inspections according to protocol. .(Public Health Science & Assessment & Analysis)</p> <p>90% of Seasonal premises inspected according to protocol.</p> <p>Arranged for translator to attend meeting with owner of restaurant requiring improvements to food storage. No charges were necessary.</p> <p>Use conflict resolution strategies when dealing with an irate owner. (Communication , Diversity and Inclusiveness)</p>	ME
2.	To adapt and provide the Food Handler Training course to high school students.	<p>Food Handler Training Course adapted to be relevant to high school students.</p> <p>Course promoted, organized and presented.</p> <p>Students become certified food handlers. (Policy and Program Planning Implementation and Evaluation; Communications, Partners, Collaboration and Advocacy)</p>	June 2009	Objectives on target	<p>Researched students' training preferences. Developed interactive training course. Had course reviewed by focus group of students and revised based on input. Included reference to appropriate websites for students to refer to.</p> <p>Promoted course to school board personnel, principals, guidance counsellors and student government bodies.</p> <p>Organized training days that best met schools' and students' schedules and needs.</p> <p>100 students were trained. Adjusted activities when students appeared restless. 95 students were certified at end of training.</p> <p>Evaluations by participants indicated 25% have jobs in food service industry. 75% have included certification in resumes when applying for</p>	ME

EE/4 -Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.	ME/3 - Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.	P/2 - Progressing Fulfilled some of the requirements of the objective/ competencies. Progress is being observed for the majority of requirements.	NI/1 -Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.
---	---	---	--

**Public Health Employee Performance Management
Planning and Evaluation Tool**

					food service jobs.	
3.	To create a resource for school nutrition program volunteers on food safety aspects of school nutrition programs, consistent with school board nutrition policy.	Food safety resource developed that reflects school board nutrition policy, provincial nutrition guidelines, and appropriate cultural diversity. (Public Health Science, Program Planning Implementation and Evaluation; Diversity and Inclusiveness ; Communication) Resource presented to school board personnel and program volunteers. (Partnerships, Collaboration and Advocacy; Communication) Evaluation of individual school policies and procedures for compliance with food safety requirements completed. (Program Planning, Implementation and Evaluation).	September, 2009	Objectives on target	Researched local school boards' nutrition policies and provincial and national school nutrition guidelines and identified appropriate food safety recommendations. (PHS) Attended internal workshop on how to prepare a power point presentation by Communications Department. (Communication) Presentation content reviewed by health unit nutrition staff to ensure compliance with provincial and local school nutrition guidelines (partnerships). Presentation reviewed by school nutrition coordinator to ensure appropriate cultural diversity was represented (diversity) Presentation promoted, organized and given to school nutrition program coordinators, volunteers and school board representative. (PCA;) Evaluation tool developed and implemented; Deficiencies in policies and procedures identified Consultation provided, and all policies were revised to be in compliance with food safety and nutrition requirements. PPIE)	ME

Employee Name:	Karen Smith
Planning Meeting Date:	
Interim Review Date:	
Performance Evaluation Date:	

Performance Management Planning and Evaluation Tool

Section B – Competency Review

During the planning stage the manager and employee discuss the competency profile and record the agreed upon proficiency level for each competency in the expected proficiency level column below. During the performance evaluation the manager and employee review the employee's Competency Based Self Assessment results for each competency in the employee's profile and discuss the extent to which the competency was demonstrated, giving a concrete behavioural example (i.e. what the employee actually did). The manager and employee then determine a rating jointly.

PERFORMANCE PLANNING		PERFORMANCE EVALUATION	
COMPETENCY	EXPECTED PROFICIENCY LEVEL	BEHAVIOURAL EXAMPLE	RATING
Public Health Sciences	2	Inspected all high risk food premises in accordance with Food Safety Protocols and explained to operators the need for any necessary changes. All food premises were in compliance after re-inspection. Attended in-service on preparing effective power point presentations and shared learnings with team at department meeting.	ME
Assessment & Analysis	3	Reviewed compliance reports for food premises in assigned district to identify trends in non-compliance and prepared monthly statistical reports. Reviewed all school nourishment program facilities in assigned district to identify food preparation and dishwashing equipment needs in preparation for funding proposal.	ME
Policy & Program Planning, Implementation & Evaluation	3	Revised food handler training course to include all Food Safety Protocol required components. Developed process evaluation questions. Piloted new course, and revised schedule based on participants' feedback.	ME
Partnerships, Collaboration & Advocacy	3	Joined school board's nutrition committee to ensure food safety matters are considered in their school nutrition policy. Participated as Environmental Health representative on Health Unit's Determinants of Health committee and identified ways that public health inspectors can increase accessibility of their food safety information to low-income residents. Shared that information with team members.	ME
Diversity & Inclusiveness	3	Aware of translation services available for clients and have utilized service when needed to ensure understanding of inspection and enforcement. Keep up to date on different foods brought into Canada and the food health hazard implications.	ME
Communication	3	Able to apply conflict resolution techniques of listening and reflecting to influence and enforce clients and operators	ME
Leadership	2	Participated on a workgroup to assess knowledge gaps for inspectors. Arranged for speaker on free standing meat plants to come in and present. Mentored and trained student over the summer.	ME
Ethics & Professionalism	3	Kept up to date with current food health hazard issues.	ME

EE/4 -Exceeds Expectations Exceeded requirements on most or all of the objectives and competencies.	ME/3 - Meets Expectations Fulfilled requirements and met performance objectives and competencies for the position assessed.	P/2 - Progressing Fulfilled some of the requirements of the objective/ competencies. Progress is being observed for the majority of requirements.	NI/1 -Needs Improvement Fulfillment of objectives and competencies was less than adequate in all or most respects. Performance is below satisfactory level and must improve.
---	---	---	--

Employee Name:	Karen Smith
Planning Meeting Date:	
Interim Review Date:	
Performance Evaluation Date:	

Performance Management Planning and Evaluation Tool

Section C – Learning and Development

During the planning stage the manager and employee complete the learning and development objectives, how this objective relates to my current job or career aspirations, the action plan/development activities, the why, resource strategies, barriers and target completion date. During the performance evaluation stage the manager and employee discuss the extent to which the action plan was achieved for each area for development. This is recorded in the outcome/results section.

Learning and Development Objective – What do I need or want to learn? What competency do I need to develop?
 Partnership and Advocacy- to develop solutions to contradictory nutrition and food safety messages by sharing information and discussing relevant issues with health unit partners
 Public Health Sciences – to learn how to incorporate school nutrition guidelines into food safety messages. I need to know what low risk foods are nutritious and how best to recommend handling higher-risk, nutritious foods in school nutrition program settings.

How does this objective relate to my current job, my competency development or my career aspirations?
 My job requires me to work with school nutrition programs who are guided by their school board nutrition policies that prohibit many low risk foods and encourage many medium and high risk foods that are more nutritious.

PERFORMANCE PLANNING					ONGOING REVIEW AND EVALUATION	
ACTION PLAN/DEVELOPMENT ACTIVITIES		WHY Why do this activity? How will this activity support my objective and competency development?	RESOURCE STRATEGIES Remember your learning style when deciding on resources. Resources could be literature, courses, policies, manager, colleagues, mentor etc	BARRIERS What could potentially prevent me from achieving my goals? How will I address them?	TARGET DATE (e.g. 12JAN10)	Outcome/Results/Reflection What did I learn? How did I apply the learning? How did I demonstrate what I have learned? How did I develop my competencies?
1.	Consult with Public Health Dietitians. Obtain and review school board and provincial nutrition policies. Review Canada's Food Guide to Healthy Eating and supporting documents. Review literature on school nutrition program guidelines, recommended foods. Review other health units' approaches to school nutrition programs' food safety education and requirements.	This activity will help me to develop the skills to work collaboratively with other health unit programs, and integrate food safety messages into other departments' projects and to integrate others' messages into food safety programs. This will enhance my knowledge on healthy eating. It will enhance my judgement in applying food safety principles in a variety of less-than-ideal settings, and incorporating what may appear to be conflicting messages. It will enhance my broader public health knowledge e.g. healthy eating, school health, healthy policy, health promotion strategies.	Obtain reference materials on school nutrition policies and their rationale. Discuss food safety concerns with Dietitians and reach consensus on messages for schools. Ask more experienced colleagues for advice on approaches to take with schools without recommended/required equipment. Review procedures at typical school nutrition program to identify common issues and possible solutions.	Time: Discuss work load issues with manager to ensure I have the time to develop and learn.: Discuss apparent contradictory messages between food safety and nutrition with Dietician and experienced colleagues.	August, 2009	I learned the importance of collaboration and partnership with colleagues from other disciplines. I learned how to apply risk management principles. I learned how to incorporate food safety into the school board nutrition policies I developed food safety guidelines for inclusion in school board nutrition policies.

Public Health Employee Performance Management
Planning and Evaluation Tool

INTERIM REVIEW (COMMENTS): Learning objectives are in progress at the review stage						
Learning and Development Objective – What do I need or want to learn? What competency do I need to develop? How to prepare power point presentations.(Communications)						
How does this objective relate to my current job, my competency development or my career aspirations? I need to be able to utilize technology in health promotion activities.						
2.	Take self-directed course in preparing effective power-point presentations.	My health education skills need to be upgraded to incorporate current technology. I can reach a broader audience by having appropriate tools.	Work through Communications Department's toolkit on preparing power point presentations.	Lack of creativity: consult with graphic designers for suggestions, critique. Time: discuss workload with Manager.	September 2009	I have prepared two power point presentations which have been reviewed my manager and used to present different audiences.
INTERIM REVIEW (COMMENTS): Learning objectives are in progress at the review stage						

