



BOARD PROCEDURE	
<i>Approval Date</i> 2015	<i>Replacing</i> All previous procedures
<i>Review Date</i> 2020	<i>Page</i> 1 of 29
<i>Contact Person/Department</i> Human Resources Administrator	<i>Identification</i> HR – 4530

PERFORMANCE APPRAISAL CANADIAN UNION OF PUBLIC EMPLOYEES (CUPE) SUPPORT STAFF

1.0 PURPOSE

It is the policy of Trillium Lakelands District School Board to conduct performance appraisals with all employees of the Board on a regularly scheduled basis.

Trillium Lakelands District School Board believes that exemplary employees demonstrate integrity, commitment, willingness to work as team members, and personal desire for continuous growth and improvement.

Trillium Lakelands District School Board believes that regularly scheduled performance appraisals provide opportunities for employees to demonstrate and be recognized for professional growth towards exemplary practice.

2.0 REFERENCES/RELATED DOCUMENTS

- 2.1 The *Education Act* and Regulations
- 2.2 CUPE collective agreement

3.0 DEFINITIONS

3.1 ANNUAL LEARNING PLAN

An annual plan outlining the employee's professional growth goals, goals and strategies recommended in the evaluation report, as well as a proposed action plan and timelines for achieving those objectives.

3.2 COMPETENCY

Performance that meets expectations for the position, where the requirements of the job are generally met in terms of quality and quantity.

3.3 EMPLOYEE DEMONSTRATING UNSATISFACTORY PERFORMANCE

The employee demonstrates major weaknesses in several components of job performance, to the point where the job is not being completed adequately as defined by the evaluator.

- 3.4 EVALUATOR: the employee's immediate supervisor. In all cases the evaluator would be an individual who is not in the union.

Support Staff Group	Evaluator
Educational Assistants	Principal/Vice Principal in consultation with Department Head of Special Education, Resource Teacher, Classroom Teacher(s) as appropriate
School Secretaries	Principal/Vice Principal
Elementary Custodians	Principal/VP in consultation with the Plant Operations Supervisor
Secondary Custodians	Secondary School Custodial Supervisor in consultation with the Plant Operations Supervisor
Board Office OCT or CM CUPE Staff	Supervisor or manager to whom the employee directly reports

3.5 PERFORMANCE APPRAISAL

Performance appraisal is a method by which the job performance of an employee is evaluated with the intent to determine whether stated goals and objectives of the role are being met. The appraisal process is an assessment of performance which is intended to seek out and celebrate areas of strength and to identify any areas where improvement could be made.

3.6 PERMANENT EMPLOYEE

An employee who has successfully completed the probationary period.

3.7 PROBATIONARY EMPLOYEE

A newly hired employee who has not completed the probationary period as defined in the collective agreement which is 60 working days (60 days at work). Unsuccessful completion of the probationary period will lead to termination prior to the granting of permanent status.

3.8 TRIAL PERIOD

A "trial period" occurs when a permanent employee has posted into a position. After a three month trial period, conditional on satisfactory performance, the position is declared permanent for the employee.

4.0 PROCEDURE

4.1 GUIDING PRINCIPLES

This procedure assumes competency on the part of the employee. In cases where competency is the issue, the procedure will guide, but not limit, the process to be determined by senior administration.

- 4.1.1 Personal professional growth is best achieved when there is a collaborative process among the parties involved.
- 4.1.2 The performance appraisal process must provide for consistency, fairness and equity for all employees.
- 4.1.3 Responsibilities and duties are as varied as the individual role. The job description for individual roles will be an integral part of the performance appraisal process.

4.2 KEY ELEMENTS

- 4.2.1 Clear communication of current duties and responsibilities.
- 4.2.2 Opportunity for dialogue throughout the process between the employee and the evaluator.
- 4.2.3 An assessment of performance where strengths and achievements are highlighted and/or areas needing improvement are identified.

4.3 ANNUAL LEARNING PLAN

- 4.3.1 The Annual Learning Plan (ALP) provides a vehicle for professional learning and growth during the evaluation year and in the intervening years between appraisals.
- 4.3.2 The Principal/Supervisor is responsible for ensuring that every CUPE employee they supervise has an ALP for each year.
- 4.3.3 Each year, CUPE employees, in consultation with their Principal/Supervisor are required to review and update their ALP, as necessary, from the previous year.
- 4.3.4 The CUPE employee and the Principal/Supervisor must sign the employee's ALP each year and each must retain a copy for his or her records.
- 4.3.5 A sample ALP Form is provided in Appendix D.

4.4 PROCESS FOR APPRAISAL OF PERMANENT EMPLOYEES

4.4.1 TIMELINES

A performance appraisal will be conducted at least once every five years.

4.4.2 PROCESS

- a) The Human Resources Department will annually develop a list of all permanent employees who are subject to a performance review and provide that list to the appropriate evaluator at the beginning of each school year.
- b) If the evaluator considers it advisable to do so, he or she may conduct performance appraisals in addition to those required. An explanation of the reason(s) for initiating the appraisal will be shared with the employee.

The employee may also request, but is not guaranteed, a performance appraisal in addition to those required.

- c) Pre-appraisal Meeting: The evaluator will meet with the employee at least 5 working days prior to the formal review. This meeting is held to ensure the employee has a thorough understanding of the process and expected timelines.

At this meeting the evaluator and employee will:

- i) review the Performance Appraisal Procedure and Form;
- ii) review the employee's Job Description and assigned duties;
- iii) determine a schedule for formal observation(s);
- iv) determine data to be reviewed or other sources of input for feedback on components of the Appraisal Form.

4.4.3 Where an initial Performance Appraisal results in an “**Overall Meets Expectations**” rating:

- a) The evaluator shall conduct a post-appraisal meeting:
 - i) This meeting will occur within 40 working days of the Pre-Appraisal meeting;
 - ii) Areas of strength and areas for potential growth will be identified;

- iii) The “Performance Appraisal Form” will be signed by the evaluator and the employee (to acknowledge receipt).
 - b) Where an employee does not agree with the rating or comments noted on the “Performance Appraisal Form” (Appendix B), the employee has the right to attach his/her comments to the form. The employee will have 2 working days to provide such written comments to the evaluator.
 - c) The “Performance Appraisal Form” shall be:
 - i) forwarded to the Human Resources Administrator, along with a copy of the employee’s Annual Learning Plan, within 15 days of the completion and signing of the Appraisal Form for filing in the personnel file; (signed original)
 - ii) retained by the evaluator (copy);
 - iii) provided to the employee (copy).
- 4.4.4 When an initial performance appraisal results in an “**Overall Unsatisfactory**” rating:
- a) The evaluator shall conduct a post-appraisal meeting:
 - i) Contact the Human Resources Administrator and Superintendent prior to the post-appraisal meeting;
 - ii) This meeting will occur within 40 working days of the Pre-Appraisal meeting;
 - iii) Five days prior to the meeting, the individual will be notified that the appraisal has resulted in an unsatisfactory rating and advise the employee of his/her right to have union representation at the meeting;
 - iv) Areas of strength and areas of unsatisfactory performance will be identified;
 - v) The “Performance Appraisal Form” will be signed by the evaluator and the employee (to acknowledge receipt);
 - vi) Areas of focus, as well as supports to assist the employee to improve will be identified for use in developing an Improvement Plan (Appendix E).
 - b) Where an employee does not agree with the rating or comments noted on the “Performance Appraisal Form”, the employee has the right to attach his/her comments to the form. The employee will have 2 working days to provide such written comments to the evaluator.

- c) The “Performance Appraisal Form” shall be:
 - i) forwarded to the Human Resources Administrator within 15 days of the completion and signing of the Appraisal Form for filing in the personnel file;(signed original)
 - ii) retained by the evaluator (copy);
 - iii) provided to the employee (copy).
- d) Within 10 days of the Post Appraisal Meeting, the evaluator will develop an Improvement Plan (Appendix E) and will meet with the employee and the union to review the Improvement Plan. The Improvement Plan shall:
 - i) incorporate areas of focus for improvement and steps and actions that the employee must take to improve performance (as discussed at the post-appraisal meeting);
 - ii) identify supports to assist the employee;
 - iii) be given to the employee and retained by the evaluator;
 - iv) be forwarded to the Human Resources Administrator within 10 days of signing the Performance appraisal (to be attached to the Performance Appraisal in the personnel file);
 - v) determine a date for the next performance appraisal. This date shall be between 40 and 60 working days of the signing of the initial Performance Appraisal Form, unless the timeline is extended based upon mutual agreement;

Note: in exercising his/her discretion as to the timing of the second appraisal, the evaluator must balance the desirability of giving the employee a reasonable opportunity to improve his/her performance against the responsibility of providing quality performance on behalf of students.

- vi) be signed by the employee to acknowledge receipt.

4.4.5 Where a second Performance Appraisal results in an “**Overall Meets Expectations**” rating, the evaluator shall:

- a) complete the “Performance Appraisal Form”;
- b) meet with the employee to discuss performance and progress relating to the “Improvement Plan”. The “Performance Appraisal Form” is signed by the evaluator and the employee;

- c) Where an employee does not agree with the rating or comments noted on the “Performance Appraisal Form”, the employee has the right to attach his/her comments to the form. The employee will have 2 working days to provide such written comments to the evaluator;
 - d) The “Performance Appraisal Form” shall be:
 - i) forwarded to the Human Resources Administrator within 15 days of the completion and signing of the Appraisal Form for filing in the personnel file; (signed original)
 - ii) retained by the evaluator (copy);
 - iii) provided to the employee (copy).
- 4.4.6 Where a second, consecutive Performance Appraisal results in an **“Overall Unsatisfactory”** rating the evaluator must:
- a) inform the employee, in writing, that he/she has been placed on “review status”;
 - b) contact the Human Resources Administrator and Superintendent prior to the meeting.
 - c) schedule a meeting with the employee and advise the employee of his/her right to have union representation;
 - d) repeat the steps as outlined in 4.4.4;
 - e) monitor the employee’s performance for the period during which the employee is “on review”.
- 4.4.7 Provision for a third performance appraisal while on review status:
- a) The third performance appraisal will be conducted by an individual designated by the Human Resources Administrator and will be someone who did not conduct the two previous unsatisfactory performance appraisals.
 - b) If the third performance appraisal results in an **“Overall Meets Expectations”** rating:
 - i) the employee immediately ceases to be on review status;
 - ii) the evaluator must advise the employee in writing of this fact, along with providing the copy of the signed Performance Appraisal report with its notice of the latest rating, with a copy to the Human Resources Administrator and Union President;

- iii) the designated evaluator will meet with the employee to discuss the Performance Appraisal;
- iv) the completed third “Performance Appraisal Form” shall be forwarded to the Human Resources Administrator within 15 days of the completion and signing of the Appraisal Form. The Appraisal Form will be:
 - filed in the employee’s Personnel File (original);
 - retained by the evaluator (copy);
 - provided to the employee, as forwarded to the Human Resources Administrator, including any correspondence/documentation (copy).
- c) If the third consecutive performance appraisal results in an “**Overall Unsatisfactory**” rating:
 - i) the evaluator must promptly send a recommendation to the Human Resources Administrator, who together with the Director will send a recommendation to Director’s Council that the employee’s employment be terminated;
 - ii) the recommendation must be shared in writing with the employee, and within 5 days, the Bargaining Unit President. It must be accompanied by written reasons for the recommendation as well as copies of the performance appraisal documents;

4.4.8 Termination without a third appraisal:

In circumstances where prompt action is required in the best interest of the system, the employer may terminate employment for “just cause”.

The recommendation to terminate must be shared with the employee, the Human Resources Administrator and, within 5 days, the Bargaining Unit President. It must be accompanied by written reasons for the recommendation, as well as copies of all Performance Appraisal documents and related correspondence.

4.5 PROCEDURES FOR APPRAISAL OF EMPLOYEES IN A TRIAL PERIOD

4.5.1 TIMELINES

A performance appraisal will be conducted at least once during the trial period (three months). It will be **completed within two months** of appointment to the position.

4.5.2 PROCESS

- a) Pre-appraisal Meeting: The evaluator will meet with the employee at least 5 working days prior to the formal review. This meeting is held to ensure the employee has a thorough understanding of the process and expected time lines.

At this meeting the evaluator and employee will:

- i) review the Performance Appraisal Procedure and Form;
 - ii) review the employee's Job Description and assigned duties;
 - iii) discuss and determine a schedule for formal observation(s) and also determine other sources of input from feedback on components of the Appraisal Form by the evaluator.
- b) Where an initial Performance Appraisal results in an “**Overall Meets Expectations**” rating, the steps to be taken by the evaluator are outlined in 4.4.3. The employee will now be deemed permanent in the position.
- c) When a performance appraisal results in an “**Overall Unsatisfactory**” rating; the steps to be taken by the evaluator are outlined in 4.4.4.
- d) Where a second Performance Appraisal results in an “**Overall Meets Expectations**” rating, the steps to be taken by the evaluator are outlined in 4.4.5. The employee will now be deemed permanent in the position.
- e) Where a second, consecutive Performance Appraisal results in an “**Overall Unsatisfactory**” rating the evaluator must:
- i) schedule a meeting with the employee and advise the employee of his/her right to have union representation.
 - ii) send promptly a recommendation to the Human Resources Administrator that the employee be returned to his/her previous position. The recommendation must be shared in writing with the employee, the appropriate Superintendent, and within 5 days, the Bargaining Unit President. It must be accompanied by written reasons for the recommendation as well as copies of all performance appraisal documents.

4.6 PROCEDURES FOR APPRAISAL OF PROBATIONARY EMPLOYEES

4.6.1 TIMELINES

A performance appraisal will be conducted at least once within the probationary period (60 working days).

4.6.2 PROCESS

- a) Pre-appraisal Meeting: The evaluator will meet with the employee within 10 working days of the start of the position. This meeting is held to establish the dates of the formal reviews and to ensure the employee has a thorough understanding of the process and expected time lines.

At this meeting the evaluator and employee will:

- i) review the Performance Appraisal Procedure and Form;
 - ii) review the employee's Job Description and assigned duties;
 - iii) discuss the schedule for formal observations and other sources of input for feedback on the components of the Appraisal Form.
- b) Where the Performance Appraisal results in an **“Overall Meets Expectations”** rating, the steps to be taken by the evaluator are outlined in 4.4.3.
- c) When an initial performance appraisal results in an **“Overall Unsatisfactory”** rating, the steps to be taken by the evaluator are outlined in 4.4.4.
- d) Where a second Performance Appraisal results in an **“Overall Meets Expectations”** rating, the steps to be taken by the evaluator are outlined in 4.4.5. The employee will now be deemed permanent in the position.
- e) Where a second, consecutive Performance Appraisal of a probationary employee results in an **“Overall Unsatisfactory”** rating, the evaluator must:
- i) schedule a meeting with the employee and advise the employee of his/her right to have union representation;
 - ii) notify the employee that he/she has not successfully completed his/her probationary period;

- iii) promptly send a recommendation to the Human Resources Administrator and the Director that the employee be terminated. The recommendation must be shared in writing with the employee, the appropriate Superintendent, and within 5 days, the Bargaining Unit President. It must be accompanied by written reasons for the recommendation as well as copies of all performance appraisal documents;
- iv) upon termination of the employee by the Director, the Human Resources Administrator will send a letter to the individual terminating his/her employment;
- v) notify the Board of Trustees of the termination of employment at its next regular meeting.
- f) Termination of a probationary employee without a first or second appraisal:

In circumstances where prompt action is required in the best interest of the system, the employer may terminate employment for “just cause”.

The recommendation to terminate must be shared with the Bargaining Unit President. It must be accompanied by written reasons for the recommendation.

5.0 APPENDICES

- Appendix A - Probationary Employees
- Appendix B - Permanent Employees
- Appendix C - Trial Support Staff
- Appendix D - Annual Learning Plan
- Appendix E - Improvement Plan
- Appendix F - Timelines Flowchart

PROBATIONARY SUPPORT STAFF PERFORMANCE APPRAISAL

Supervisor:	Title:
Employee:	Position:
Location:	Date of Performance Appraisal:

Instructions:

This evaluation is for an individual that is a **new hire** to the Board. Please complete this form at least once during the probationary period (60 working days).

If the appraisal results in an overall unsatisfactory rating, contact your Superintendent and the Human Resources Administrator prior to completion of the probationary period.

A rating of Satisfactory or higher will result in a Probationary employee moving automatically to permanent status with the Board.

Please refer to Administrative Procedure: Performance Appraisal CUPE Support Staff HR-4530 for additional information regarding the performance appraisal process.

Guide to Rating System:

**Exceeds Satisfactory
Expectations:**

Performance that consistently exceeds expectations.

Meets Expectations:

Performance that meets the basic expectations.

Unsatisfactory:

Performance that does not meet expectations.
Performance must be improved.

Evaluator to complete:

Sources of input used by the evaluator for feedback on components of the Appraisal form:

**KNOWLEDGE, SKILLS & QUALITIES ESSENTIAL TO PERFORM THE
REQUIRED DUTIES OF THE JOB**

Unsatisfactory	Meets Expectations	Exceeds Expectations
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Job Knowledge	Has knowledge of the techniques, assigned duties, skills, processes, procedures, equipment and materials required to perform the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Job Skill	Applies skills and techniques required to perform the duties of the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Quality of Work	The degree of acceptability of work regularly performed by the employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Work Organization	Organizes work effectively and safely, keeps reasonable records and meets expectations set by supervisor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Communication	Communicates clearly and interacts appropriately with staff, students, and others. (In person, on the phone, or in writing.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Personal Characteristics	Demonstrates independence and adaptability.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:



Relationships Employs interpersonal skills and strategies to establish and maintain good working relationships with students, staff and the general public.

Observations:

Overall Evaluation of the employee's performance in the job function:

COMMENT ON THEIR DEMONSTRATED STRENGTHS:

Suggestions for growth:

An improvement plan is attached (required in the case of an unsatisfactory appraisal).

Evaluator's Signature

Date

Employee Section

In general, does the employee agree with the evaluation? Yes No

Employee's comments on this performance appraisal:

additional comments are attached

Goals for next period:



This report has been reviewed with me and I hereby acknowledge receipt of a copy

Employee's Signature

Date

**KNOWLEDGE, SKILLS & QUALITIES ESSENTIAL TO PERFORM THE
REQUIRED DUTIES OF THE JOB**

Unsatisfactory
Meets
Expectations
Exceeds
Expectations

Job Knowledge	Has knowledge of the techniques, assigned duties, skills, processes, procedures, equipment and materials required to perform the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				
Job Skill	Applies skills and techniques required to perform the duties of the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				
Quality of Work	The degree of acceptability of work regularly performed by the employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				
Work Organization	Organizes work effectively and safely, keeps reasonable records and meets expectations set by supervisor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				
Communication	Communicates clearly and interacts appropriately with staff, students and others. (In person, on the phone, or in writing.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				
Personal Characteristics	Demonstrates independence and adaptability.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Observations:				



Goals for next period:

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This report has been reviewed with me and I hereby acknowledge receipt of a copy

Employee's Signature

Date

TRIAL SUPPORT STAFF PERFORMANCE APPRAISAL

Supervisor:

Title:

Employee:

Position:

Location:

Date of Performance Appraisal:

Instructions:

If the appraisal results in an overall unsatisfactory rating, contact your Superintendent and the Human Resources Administrator **prior** to completion of the trial period.

Please refer to Administrative Procedure: Performance Appraisal CUPE Support Staff HR-4530 for additional information regarding the performance appraisal process.

Guide to Rating System:

Exceeds

Expectations:

Performance that consistently exceeds expectations.

Meets Expectations:

Performance that meets the basic expectations.

Unsatisfactory:

Performance that does not meet expectations.
Performance must be improved.

Evaluator to complete:

Sources of input used by the evaluator for feedback on components of the Appraisal form:

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**KNOWLEDGE, SKILLS & QUALITIES ESSENTIAL TO PERFORM THE
REQUIRED DUTIES OF THE JOB**

Unsatisfactory
Meets
Expectations
Exceeds
Expectations

Job Knowledge	Has knowledge of the techniques, assigned duties, skills, processes, procedures, equipment and materials required to perform the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Job Skill	Applies skills and techniques required to perform the duties of the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Quality of Work	The degree of acceptability of work regularly performed by the employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Work Organization	Organizes work effectively and safely, keeps reasonable records and meets expectations set by supervisor.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Communication	Communicates clearly and interacts appropriately with staff, students and others. (In person, on the phone, or in writing.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:

Personal Characteristics	Demonstrates independence and adaptability.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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Observations:



Relationships Employs interpersonal skills and strategies to establish and maintain good working relationships with students, staff and the general public.

Observations:

Overall Evaluation of the employee's performance in the job function:

COMMENT ON THEIR DEMONSTRATED STRENGTHS:

Suggestions for growth:

An improvement plan is attached (required in the case of an unsatisfactory appraisal).

Evaluator's Signature

Date

Employee Section

In general, does the employee agree with the evaluation? Yes No

Employee's comments on this performance appraisal:

additional comments are attached



PERFORMANCE APPRAISAL FOR CANADIAN UNION OF
PUBLIC EMPLOYEES
HR-4530 Appendix C

Goals for next period:

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This report has been reviewed with me and I hereby acknowledge receipt of a copy

Employee's Signature

Date



ANNUAL LEARNING PLAN

Employee Name: _____

Department: _____

Supervisor: _____

Job Title: _____

Background to Inform Professional Growth Goals, Action Plan, and Timeline:

Please bring your professional growth goals and strategies from the summative report of your most recent Performance Appraisal or Annual Learning Plan.

Professional learning and growth that I have experienced over the past year(s):

Professional Growth Goals	Professional Growth Strategies to Help Reach Goals	Action Plan and Timelines

**Annual Learning Plan
Page 2**

Other Comments (Employee)

Other Comments (Supervisor)

Supervisor's Signature (I consulted with the employee to update their Annual Learning Plan.)

Date (yyyy/mm/dd)

Employee's Signature (I consulted with my supervisor to update my Annual Learning Plan.)

Date (yyyy/mm/dd)



Improvement Plan

The Improvement Plan must be prepared by the supervisor within 10 working days of the signing of the summative report which indicates an unsatisfactory performance. This plan must set out steps and actions that the employee should take to improve his or her performance. The supervisor must seek input from the employee as to what steps and actions could help him or her improve job performance.

Last Name:

First Name:

Assignment:

Supervisor's Last Name:

First Name:

General Expectations:

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Areas Requiring Improvement	Steps and Actions for Improvement	Sample Indicators of Success



Support Examples:
Date of next performance appraisal:
Employee's Comments on the Improvement Plan:
Supervisor's Comments on the Improvement Plan:

Supervisor's Signature
My signature indicates that I developed this Improvement Plan with the employee's input

Date

Employee's Signature
(To acknowledge receipt)

Date

CUPE Performance Appraisal Timelines

