



UNIVERSITY OF MANITOBA PROCEDURE

Procedure:	PERFORMANCE PLANNING AND REVIEW FOR SUPPORT STAFF
Parent Policy:	Performance Planning and Review for Support Staff
Effective Date:	November 18, 2008
Revised Date:	
Review Date:	November 18, 2018
Approving Body:	Administration: President
Authority:	Policy: Performance Planning and Review for Support Staff
Responsible Executive Officer:	President: Delegated to Vice-President (Administration)
Delegate: (If applicable)	
Contact:	Executive Director of Human Resources
Application:	Employees: See List

Group:

- a) The Executive Staff (support staff only)
- b) Excluded Management, Administrative and Professional Staff;
- c) Medical Practitioners and Administrators;
- d) Support Staff in Bargaining Units
- e) Student Support Staff; and
- f) Out of Province Support Staff.

Part I Reason for Procedure(s)

To set out Procedures secondary to the Policy: Performance Planning and Review for Support Staff for the provision of guidance on the requirements for performance planning and reviews of support staff.

Part II Procedure(s)

- 2.1 Upon request, Human Resource Services will provide managers and supervisors with information, sample formats, advice and assistance on all aspects of performance review and planning. Performance Planning and Review formats should be reviewed by the Human Resource Consultant prior to use.
- 2.2 Plan for completion of Performance Plans and Reviews
 - 2.2.1 Each department shall have a person or persons with managerial or supervisory responsibility who are accountable for conducting the Performance Plan and Review for all employees within the department.
 - 2.2.2 Persons responsible for conducting Performance Planning and Reviews shall ensure that they have received appropriate level of training to conduct such a process. The appropriate head of the administrative unit or faculty shall be responsible for ensuring that those individuals conducting performance evaluations have received appropriate training related to performance evaluations.
 - 2.2.3 All managers and supervisors responsible for conducting Performance Plans and Reviews for employees shall advise the affected employees of the timing for such a review and the process or format for the review.
 - 2.2.4 Employees shall be provided with a reasonable amount of notice of the meeting to discuss the Performance Planning and Review so that the employee can prepare for such a discussion.
- 2.3 Purpose of Performance Planning and Review
 - 2.3.1 The purposes for conducting a performance plan and review are identified in section 2.1 of the Policy on Performance Planning and Reviews for Support Staff.
- 2.4 Confidentiality of the Performance Planning and Review Process
 - 2.4.1 The departmental goals and objectives set for an employee are not confidential and departments are encouraged to communicate the goals and objectives to all employees in the unit.
 - 2.4.2 Commentary or assessment of individual performance and developmental needs or plans for individual employees are confidential and should not be shared with others.
- 2.5 Documentation of the Performance Plan and Review

2.5.1 Performance Objectives or Planned Targets should be documented in writing at least annually. Both the employee and the supervisor/manager should have a copy of this Plan.

2.5.2 Following the review by the supervisor or manager the employee shall have the right to place his/her own comments on the review form or to append comments to the form. Employees will be provided with a copy of the final document.

2.5.3 Employees are not required to sign the performance plan and review document. Signing the document does not signify agreement with the assessment and instead merely signifies that it was read and the employee received a copy.

2.5.4 Copies of the Performance Planning and Review documentation shall be kept in the files of the department manager or supervisor. A copy of the document shall also be forwarded to Human Resource Services for inclusion in the employment file for the employee.

2.5.5 Human Resource Services shall provide assistance to departments and employees in matters identified in the Performance Planning and Review.

Part III Accountability

- 3.1 The University Secretary or the President is responsible for initiating a formal review of these Procedures.
- 3.2 The Executive Director of Human Resources is responsible for the communication, administration and interpretation of this Procedure.

Part IV Review

- 4.1 Formal Procedure reviews will be conducted every ten (10) years. The next scheduled review date for this Procedure is November 18, 2018.
- 4.2 In the interim, these Procedures may be revised or rescinded if:
 - a) the Approving Body deems necessary (or the President deems necessary where the approving body is the Administration);
 - b) the relevant Policy is revised or rescinded.

Part V
Effect on Previous Statements

5.1 This Procedure supersedes:

- a) all previous Board/Senate Procedures, and resolutions on the subject matter contained herein;
- b) all previous Administrative Procedures, and resolutions on the subject matter contained herein; and
- c) Policy Performance Planning and Review for Support Staff (dated June 30, 2000).

Part VI
Cross References

Policy: Performance Planning and Reviews for Support Staff