



Policy 2.1.5

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Committee : HR VSST
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PERFORMANCE APPRAISALS

DIOCESE OF NOVA SCOTIA AND PRICE EDWARD ISLAND

Pertains to: ***Diocesan Staff***

1. Personnel management is the process by which an employer obtains, uses, and maintains a satisfied and engaged workforce. Components of personnel management are planning, organizing, compensating, integrating, and maintaining people for the purpose of contributing to the organizational, individual, and societal goals. One aspect of personnel management is performance appraisals.
2. Performance appraisal is a systematic evaluation of the performance of the employee with the objective to determine future growth and development. The objectives of performance appraisals are:
 - a. to identify the strengths and weaknesses of employees;
 - b. to provide feedback to employees regarding their performance and related status;
 - c. to serve as a basis to influence the work habit of the employees;
 - d. to determine training or other development opportunities for the employees; and
 - e. to determine the compensation package for the employees.
3. The Diocese of Nova Scotia and Prince Edward Island is committed to providing performance appraisals on all Diocesan staff on completion of the fiscal/calendar year. Performance appraisals are based on the job description for each Diocesan staff position, which should be reviewed on a periodic basis to ensure relevancy to the actual duties performed. The following process will be followed for performance appraisals for Diocesan staff and these may be adopted by Parishes with full or part time staff if so desired:
 - a. at the start of the fiscal/calendar year, the supervisor and employee shall meet and determine goals and objectives based on the work description for the upcoming year;
 - b. mid-way through the year, the supervisor and employee shall meet for a review of the goals and objectives to provide feedback on how the employee is tracking on the goals and objectives and to provide assistance to meeting the goals and objectives or to adjust the goals and objectives if necessary;
 - c. prior to the close of the fiscal/calendar year, the employee is asked to submit his/her accomplishments during the year;
 - d. the supervisor reviews the submitted list and the goals and objectives and then prepares the performance appraisal;
 - e. when the performance appraisal is completed the supervisor shall provide a copy to the employee for a review of not less than 24 hours, to enable the employee to identify areas

that may have been missed and to assist in preparation for the performance appraisal interview;

- f. after the review period the supervisor and employee shall meet and discuss the performance appraisal, make any adjustments that are deemed necessary and sign and date the performance appraisal. A copy of the signed performance appraisal is to be given the employee;
- g. the original signed performance appraisal is to be provided to the Diocesan Executive Director, who shall meet with the Chair of the HR VSST, or his/her designate to discuss the performance appraisals; and
- h. the original performance appraisals shall be retained on the employees personnel file and destroyed in accordance with Diocesan records destruction policy.

4. For employees who have met or exceeded the goals and objectives the Diocesan Executive Director and Chair of the HR VSST shall determine if additional training or development opportunities should be afforded the employee and develop a plan, in conjunction with the employee, to execute this plan. Employees who not yet reached the maximum step for their position would have the next step effective on their anniversary date of employment with the Diocese. If the performance appraisal is after the anniversary date, the step increase will be backdated to the anniversary date.

5. For employees who have not met the goals and objectives the Diocesan Executive Director and the Chair of the HR VSST shall attempt to determine why these were not met and if it is within the ability of the employee to meet these goals and objectives. If it is determined that there were extenuating circumstances that may have affected the employee's work, these will be taken into consideration. The Diocesan Executive Director and Chair of the HR VSST shall prescribe a course of action to enable the employee to achieve the goals and objectives and that failure to meet the goals and objectives within the prescribed period, a minimum of six months, may lead to dismissal from the position. Employees who have not reached their maximum step for their position will have the step deferred until they are able to meet the goals and objectives. This deferral does not affect any wage adjustment approved by the HR VSST, such as adjustments for the cost of living.

6. In the case of senior Diocesan staff, the Bishop shall replace the Diocesan Executive Director for discussions with the Chair of the HR VSST on performance appraisals.