BEHAVIOURAL COMPETENCIES

for Canada's Substance Use Workforce v. 2

Performance Management Tool for Administrative Support

Canadian Centre
**on Substance Use
and Addiction**

Evidence. Engagement. Impact.

PERFORMANCE MANAGEMENT TOOL FOR ADMINISTRATIVE SUPPORT

This performance management tool provides you with a process and templates for conducting employee performance reviews within the **Administration Support** occupational cluster. It includes a selection of sample performance objectives for the behavioural competencies and proficiency levels relevant to the suggested competency profile.

This tool is useful as a template or starter guide, but it might not accurately represent the competencies required for the position you are evaluating.

To assess and revise the tool so it is well-suited to your organization:

- Review the tool to determine if the suggested competency profile is relevant.
- Adjust the profile, as necessary, to suit the job description and your organization.
- Review the behavioural competencies to determine what competencies or proficiency levels you need to change to give a more accurate representation. A brief overview of the steps for identifying the relevant competencies for a profile is provided in the resource, *Adapting the Proficiency Profiles*.

> A job competency profile includes only the critical competencies required for the job, not those that are "nice to have"—that is, not essential to performing the job successfully.
>
> Preferably, each profile should have no more than 12 competencies.

It may be that the competencies related to the performance objectives are not all identified in the planning stage. Others can be added as needed. Typically, each performance objective has one related competency or more.

To assist you in planning the initial review, sample performance objectives have been provided. They relate to the behavioural competencies in each job profile.

Ensure that all performance evaluations are conducted in accordance with existing organizational policies and procedures.

Behavioural Competencies for Canada's Substance Use Workforce
Performance Management Tool for Administrative Support

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CONFIDENTIAL WHEN COMPLETED

Performance Management Tool for Positions Related to Administrative Support
Position Title:
Employee Name:
Manager's Name and Title:

Review Period from *(Month/Year)* to *(Month/Year)*:	Date of Review *(Day/Month/Year)*:

Preparation Checklist

- ☐ Review job description to identify the target position requirements and competencies.
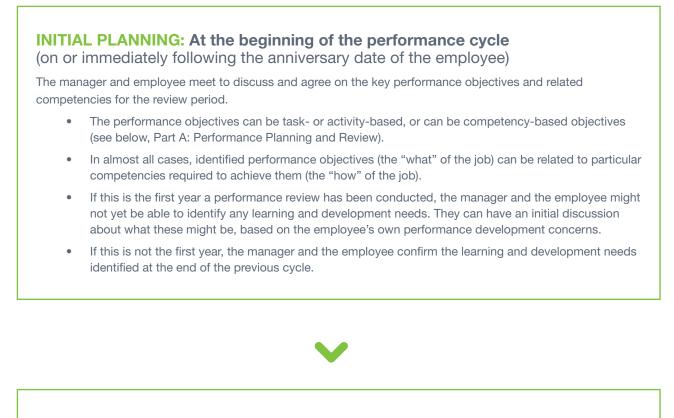- ☐ Review previous performance evaluation, if available.

Suggested Competency Profile

Job Cluster	Example Job Titles
Administrative Support	Administrative Assistant, Administrator, Regional Administrator, Clinic Technician

Competency Required	Proficiency Levels
Adaptability and Flexibility	1
Analytical Thinking and Decision Making	1
Continuous Learning	2
Culturally Safe and Anti-oppressive Practice	1
Effective Communication	2
Ethical Conduct and Professionalism	1
Interpersonal Rapport	2
Person-directed Care	1
Planning and Organizing	2
Self-care	2
Self-management	2
Teamwork and Cooperation	2

How to Use this Form

INITIAL PLANNING: At the beginning of the performance cycle
(on or immediately following the anniversary date of the employee)

The manager and employee meet to discuss and agree on the key performance objectives and related competencies for the review period.

- The performance objectives can be task- or activity-based, or can be competency-based objectives (see below, Part A: Performance Planning and Review).

- In almost all cases, identified performance objectives (the "what" of the job) can be related to particular competencies required to achieve them (the "how" of the job).

- If this is the first year a performance review has been conducted, the manager and the employee might not yet be able to identify any learning and development needs. They can have an initial discussion about what these might be, based on the employee's own performance development concerns.

- If this is not the first year, the manager and the employee confirm the learning and development needs identified at the end of the previous cycle.

INTERIM REVIEW: During the cycle (6-month review or equivalent)

The manager and employee meet to review progress in achieving performance objectives and begin to identify areas for development. Formal reviews might also be conducted throughout the period; for example, when either the manager or employee changes jobs, when there is significant change in the existing job or at the end of a key milestone.

- Performance objectives might need adjusting if work or priorities have changed since the beginning of the cycle (see below, Part A: Performance Planning and Review).

- If this is the first year a performance review has been conducted, the manager and the employee can begin to identify learning and development needs (see below, Part B: Learning and Development).

- If this is not the first year a performance review has been conducted, the manager and employee review the employee's accomplishment of the action plan so far and adjust, as necessary (see below, Part B: Learning and Development).

FINAL REVIEW: At the end of the cycle (on or near the anniversary date of the employee's hiring)

The manager and employee meet to discuss and agree on the key performance objectives and related competencies for the review period.

- Record the employee's performance for each of the required competencies (see below, Part A: Performance Planning and Review).

- For each objective, the manager and employee discuss the extent to which objectives were achieved. This is recorded in the "Results" section.

- In the "Rating" section, employee and manager use the rating scale provided at the end of this document to evaluate results.

- If this is the first year a performance review has been conducted, the manager and the employee work together to identify the learning and development needs and the required action plan for the following review cycle (see below, Part B: Learning and Development). Focus is on the most pressing learning needs (e.g., up to five areas for development).

- If this is not the first year, the manager and employee review the employee's accomplishment of the action plan throughout the previous year (see below, Part B: Learning and Development).

SIGN OFF: At the end of the cycle (on the anniversary date of the employee's hiring)

- The manager prepares the final summary review and evaluation, and reviews the results with the employee (see below, Part C: Final Evaluation).

- The manager and employee jointly determine and agree to an action plan to enhance performance and results. This plan includes action to be taken by both the manager and the employee (see below, Part C: Final Evaluation).

- The employee comments on their own performance over the review cycle and the results (see below, Part C: Final Evaluation).

- The original of the completed form is placed in the employee's Human Resource file and the manager gives a copy to the employee.

PART A: Performance Planning and Review				
Related Competencies	**Sample Performance Objectives**	**Results Achieved**	**Rating**	
			Self	**Mgr**
Adaptability and Flexibility **Teamwork and Cooperation**	1. Provide administrative coverage or support for other departments during periods of absence of other administrative staff or when necessary.			
Analytical Thinking and Decision Making	2. Provide timely information on user activity based on an analysis of available data (e.g. appointment scheduling systems).			
Person-directed Care **Interpersonal Rapport** **Ethical Conduct and Professionalism**	3. Provide necessary information to individuals within the boundaries of confidentiality policies or contact appropriate staff to share information, as appropriate.			
Continuous Learning **Self-care**	4. Undertake training as identified by supervisor and individual learning plan.			

PART A: Performance Planning and Review			Rating	
Related Competencies	**Sample Performance Objectives**	**Results Achieved**	**Self**	**Mgr**
Effective Communication **Self-management** **Culturally Safe and Anti-oppressive Practice**	5. Ensure effective, inclusive and non-stigmatizing communication is maintained between service users and colleagues at all levels, both verbally and in writing.			
Planning and Organizing **Ethical Conduct and Professionalism**	6. Maintain and create efficient filing systems (electronic or hard copy) to facilitate data retrieval and ensure that confidentiality is preserved.			
Self-care **Teamwork and Cooperation** **Adaptability and Flexibility**	7. Seek assistance from others to resolve issues or meet demands of the workload, as appropriate.			

PART B: Learning and Development			
Areas for Development	**Action Plan or Development Options**	**Target Completion Dates**	**Results**

PART C: Summary Review and Overall Evaluation

- After discussion on Parts A and B, the manager prepares summary comments on the employee's overall performance during the review period and rates the employee's performance.

- The employee and manager agree on a mutual action plan, recording the actions to be taken by the manager and employee to achieve desired results (includes making funds, time and resources available, as necessary).

- The employee records summary comments on own performance and the review process, as desired.

- Both the manager and employee sign the evaluation.

Rating Scale	
4	**Exceeds Expectations** Exceeded requirements on most or all important elements of the objectives.
3	**Meets Expectations** Fulfilled requirements and met performance objectives within the standards for the position assessed.
2	**Progressing** Fulfilled some of the requirements of the objectives. Progress is being observed for the majority of objective requirements.
1	**Needs Improvement** Fulfillment of objectives was less than adequate in all or most respects. Performance is below satisfactory level and must improve.

Overall Evaluation	☐ Needs Improvement	☐ Progressing	☐ Meets Expectations	☐ Exceeds Expectations
Manager Comments or Summary				
Mutual Action Plan				
Employee Comments				

Employee Signature	Manager Signature	Date (dd/mm/yy)

NOTE: By signing here, the employee acknowledges reading the results and discussing them with the manager.