

Individual Performance Plan

Original Implementation Date: 1997 Approved by:
Date of Last Revision: November 9, 2020 Approved by: Jacques Dubé, CAO
Effective Date of Last Revision: August 1, 2021 Approved by: Jacques Dubé, CAO

1 – Policy Name

Individual Performance Plan

2 – Purpose

Halifax Regional Municipality recognizes that employees who understand their work expectations and have the knowledge and skills to achieve those expectations, are better positioned to provide service excellence. Completing an individual performance plan allows employees and supervisors to plan, evaluate and modify major goals, key responsibilities and learning objectives that contribute to the strategic priorities of their business unit.

3 – Objectives

The objectives of this Policy are:

- To align individual contributions with business unit strategic plans.
- To provide employees with clear expectations, feedback and coaching.
- To identify learning activities to assist employees in performing their roles.

4 – Scope

This Policy applies to all non-union Halifax Regional Municipality employees.

5 – Definitions

In the context of this document:

Competencies means observable abilities, skills, knowledge, motivations or traits defined in terms of the behaviours needed for successful job performance.

Goals or Key Responsibilities means the work results an employee is expected to achieve over the next fiscal year.

Individual Performance Plan means the tool used to establish performance expectations and support the performance evaluation of each employee.

Learning Objectives means new competency-based knowledge, information or skills that will help employees improve in their job.

Our Values means the stated principles that guide the Municipality's actions and behaviours. They include: respect, collaboration, diversity and inclusion, integrity, accountability, evidence-based decision making and sustainability.

6 – Roles and Responsibilities

Executive Directors

Executive Directors are responsible for:

- Clarifying business unit strategy, including goals and priorities, with directors/managers.
- Ensuring all non-union employees complete an annual individual performance plan.
- Reviewing completed individual performance plans and ensuring they are added to each employee's personnel file.

Directors/Managers/Supervisors

Directors/Managers/Supervisors are responsible for:

- Identifying goals and priorities for their section based on the business unit's strategic business plan.
- Clarifying business unit goals and priorities with staff to assist with individual goal-setting.
- Reviewing the supervisor's guide for completing the plan and ensuring employees have a copy of the employee guide and form template.
- Collaborating with individual employees to plan and set goals, key responsibilities and competency-based learning objectives for the fiscal year using the individual performance plan form.
- Holding regular meetings with individual staff members to discuss goal progress and address any areas of concern.
- Adjusting goals based on changing priorities and requirements of the business unit.
- Conducting a final review at fiscal year-end, reflecting on goal results and completing the individual performance plan form.
- Providing the completed form to the next level supervisor for review and sign-off.
- Providing each employee with a final signed copy of their individual performance plan form.

Employees

Employees are responsible for:

- Reviewing the individual performance plan employee guide.
- Collaborating with their supervisor to plan and set goals, key responsibilities and competency-based learning objectives for the fiscal year using the individual performance plan form.
- Meeting regularly with their supervisor to discuss goal progress and any challenges that require coaching or intervention.

- Working with their supervisor to adjust goals as necessary based on changing priorities and requirements.
- Completing the individual performance plan form for final review at fiscal year-end and meeting with their supervisor to discuss final results.

Human Resources

Human Resources is responsible for:

- Updating and maintaining individual performance plan materials.
- Providing assistance to supervisors and employees on the procedures and materials.

7 – Policy Regulations

To accomplish the goals of our organization, employees should understand how their contributions impact the overall success of the Municipality. An annual performance plan process links individual goals and key responsibilities with organizational strategy and identifies competency-based learning objectives for continuous improvement.

All non-union employees must complete an individual performance plan each fiscal year (April 1 to March 31).

All non-union employees will receive a signed-off copy of their completed individual performance plan form each year.

8 – Repeal

Replaces former Performance Development Process, April 13, 2015.

9 – Effective Date

August 1, 2021

10 – Related Policies and Practices

Employee Competency Dictionary

11 – Policy Review

Review every 3 years.

12 – Contact

For information about the individual performance plan process or resources, please contact: My HR at 902-490-6145 or MyHR@halifax.ca.

If you understand the individual performance plan process and have the necessary form, guide and tools, but are experiencing challenges in completing the plan, please contact your business unit's HR Business Partner.

13 – Attachments

Web addresses to find form templates and guides for **My Action Plan 2** are listed below.

My Action Plan 2 Form

Adobe PDF version (electronic signature compatible)

<http://intranet.halifax.ca/BusinessUnits/HumanResources/Documents/MyActionPlan2FormforReader.pdf>

Microsoft Word version

<http://insidehrm.halifax.ca/BusinessUnits/HumanResources/Documents/MyActionPlan2Form.docx>

My Action Plan 2 Guide for Employees

http://intranet.halifax.ca/BusinessUnits/HumanResources/Documents/MAPGuideforEmployees_AdobeReaderversion.pdf

My Action Plan 2 Guide for Supervisors

http://intranet.halifax.ca/BusinessUnits/HumanResources/Documents/MAPGuideforSupervisors_AdobeReaderversion.pdf