



**HERITAGE COLLEGE
POLICY #12**

**CONCERNING
THE APPRAISAL OF NON-TEACHING PERSONNEL**

ADOPTION AND REVISION

The present Policy was adopted on May 7, 1996.

Most recent date of revision:

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ARTICLE 1

Preamble

The present policy, as described in article 5.3 of Heritage College Policy #10 Concerning Human Resources Management, is based on the values set out in the human resources management philosophy and policies of Heritage College. It has been the object of consultations with personnel, union authorities, and administrators of the College.

ARTICLE 2

Definition

An **interactive performance appraisal** system is a management tool characteristic of the organizational development of the College and of the individual development of each staff member.

The interactive performance appraisal may be described as an act which consists of observing the existing situation with respect to:

- the results of the work or the contribution of a person;
- the person's perception of the work and work environment

and comparing that existing situation to a desired or expected situation.

ARTICLE 3

Objectives

The interactive performance appraisal meets institutional and individual needs, both of which are complementary.

3.1 For the College, the appraisal is a means of:

- knowing where it is headed and how it intends to get there;
- making known its priorities and objectives;

- improving the efficiency of the organization and its human resources;
- better utilizing its human resources while reconciling personal aspirations and organizational needs;
- evaluating personnel management policies.

3.2 For the person who evaluates, the appraisal is a means of:

- knowing the performance level attained by the person being evaluated;
- identifying the strengths of the person being evaluated and the areas requiring improvement in order to obtain information to support the person in her/his career development or to increase her/his tasks and responsibilities;
- identifying the perceptions of the person being evaluated with respect to her/his work, the quality of life at work, and her/his relationship with the evaluator, in order to develop a constructive relationship with the supervisor based on clear feedback.

3.3 For the person being evaluated, the appraisal is a means of:

- participating in establishing and respecting her/his own work expectations;
- giving her/him a basic and necessary psychological security by allowing her/him to receive and give regular and clear feedback on her/his performance, work and quality of life at work;
- identifying her/his strengths and areas requiring improvement and using them to make career and professional development plans or to improve work habits or procedures;
- establishing an ongoing relationship with the evaluator.

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ARTICLE 4 Principles and Other Considerations

4.1 Principles

The interactive performance appraisal program constitutes one aspect of *Heritage College Policy #10 Concerning Human Resources Management*. With this in mind, it is based on the principles described in article 4 thereof.

4.2 Other Considerations

- The evaluation must be understood, first, to be a continuous process of feedback (training aspect); the annual evaluation constitutes a summary of this continuous process (review aspect).
- The evaluation is based on the following values: honesty, openness, mutual respect and equity.
- The evaluation process is adaptable to different types of activities in each category of personnel.
- It is customary that the evaluator and the person being evaluated mutually indicate their expectations with respect to the work to be done.
- After discussion, the evaluation factors must be defined prior to the period or cycle covered by the evaluation.
- The evaluation must take into account all of the tasks and objectives of a given position. The appraisal covers all steps of a given task: its preparation, its performance, and its results.

- The evaluation process influences the self-awareness of a person; it is therefore a process for which various abilities may be developed through professional development workshops, communication, problem-solving, observation skills, etc. Also, the evaluation must be based on criteria known to all persons involved, and must be built on sufficiently reliable, precise and complete data so as to direct the actions to be taken.
- The decisions and actions triggered by the evaluation are directed principally toward providing the staff with assistance concerning improvement, development of teaching, and other activities conducted by the College.

ARTICLE 5 Characteristics

The interactive performance appraisal system is meant to be a tool with the following characteristics:

- **simple**—requiring a minimum of paper, forms, and bureaucracy;
- **giving responsibility**—as it is managed and controlled in consultation with the person being evaluated;
- **significant**—representative of the responsibilities and mandates of the person being evaluated, built with the cooperation of all categories of human resources within the College (i.e., support staff, non-teaching professionals, faculty and management), reflecting their preoccupations and values;
- **interactive**—because it allows the person being evaluated, as well as the person who acts as evaluator, to receive and give feedback with respect to whether the work objectives have been reached, thus promoting two-way communication;

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- **useful**—because it contributes to the development of interpersonal relations while clarifying mutual expectations, and helps to point out the objectives and the means by which they may be reached.

- **current, progressive and dynamic**—subject to constant revision and improvement to ensure its validity, reliability and usefulness.

ARTICLE 6 Amendment

This policy may be amended from time to time, or repealed, in accordance with College procedures.