**BELKIN HOUSE POLICIES & PROCEDURES**

**REVIEWED: JUNE 2017**

**2.1.8 Performance Appraisals / Career & Succession Planning**

Issued By: Executive Director

Effective Date: October 01, 2008

Updated: November 1, 2013

Effective performance reviews are those that are conducted on a daily basis throughout the year. Supervisors and managers should observe their employee’s performance and provide immediate feedback for good performance as well as performance needing improvement. Besides better motivating the employee and/or allowing the employee to address required improvements immediately, it eliminates the chance of any surprises during the formal review sessions. To facilitate conducting the formal performance appraisal, Supervisors should keep notes and observations of their employee’s performance throughout the year. This will help provide the employee with a balanced and objective formal appraisal. The supervisor should also consult with clients and co-workers of the employee to obtain as much pertinent performance feedback as possible.

The formal performance appraisal is designed to promote understanding between supervisors and employees about job responsibilities and performance expectations/objectives. The primary goal of the Appraisal is to solidify the commitment of both parties to achieve the best possible performance results and to identify developmental opportunities. Meeting this goal is achieved effectively when:

* individual employee performance over the review period is measured against established job standards performance expectations
* employee growth and development is encouraged through accurate feedback from observations collected throughout the year
* employee achievements are recognized
* specific, constructive recommendations are offered when performance improvement or development is required
* employee comments are encouraged
* clear objectives are mutually established for the upcoming review period
* career and succession goals and objectives are explored and stated
* necessary training or opportunities for training are explored, agreed upon and stated

All Belkin House Employees (including Management) will benefit from, as a minimum:

* A Performance Appraisal just prior to the Employee reaching the first 455 hours of their employment (which is normally the conclusion of the probationary period)
* Where the probationary period has been extended beyond 455 hours – an end of probationary period Performance Appraisal
* An annual Performance Appraisal (March of each year)

Note: wherever possible

* A mid-probation Performance Appraisal will be undertaken for the Employees benefit
* a semi-annual Performance Appraisal ( mid-year) will be undertaken for the Employees benefit.

The above Appraisals will be completed by and presented by their immediate Supervisor.

Supervisors will review all completed evaluations with their Departmental Director prior to providing the Employee with a completed copy for review.

In the case of Manager or Director - level positions a copy of the completed P.A. will be submitted to the Employee at least 3 days prior to the Appraisal meeting so they will have the benefit of reviewing it prior to the meeting. Otherwise, recognizing for some Employees this may cause unnecessary stress; it will be left to the Supervisors discretion as to whether or not a copy of the completed P.A. will be submitted to the Employee in advance of the Appraisal meeting.

**Succession Planning**

The basis for developing and retaining highly competent and mission focused people is effective recruitment, performance evaluation, feedback, training and career planning practices. Linked to career planning, and an important part of the appraisal process, is the succession planning process whereby specific positions within the organization are identified and potential career path options are explored with employees who express interest and demonstrate potential.

The Belkin House succession plan is a facility plan developed by management on an ongoing basis, consisting of a list of high potential employees identified as potential candidates for a) executive level positions within The Salvation Army or b) management, caseworker, chaplain, administration level positions and other designated positions within Belkin House.

A high potential employee is identified a number of ways; a) through their direct expression to management, b) through the annual performance appraisal process, c) by management based on observation, achievement and conversation, d) through the general feedback of others (peers, residents, etc).

**The Belkin House succession plan consists of the following key elements:**

* • Specific Designated Positions
* • Names of Prospective Candidates
* • Assessment of Candidate Readiness
* • Development Plan for Candidates

**Candidate readiness is assessed according to the following 3 level system:**

1 – Ready now 2 – Ready in one to two years 3 – Ready in three or more years

The succession planning process will normally receive increased focus during the annual performance appraisal season which commences February through April.

In addition to the supervisor identifying strengths and setting performance expectations for each employee, career interests of the employee will also be noted. Where a supervisor notes potential in an employee or where an employee expresses interest to explore the potential for advancement, the supervisor will have a conversation with the employee with respect to their future plans and their noted progression.

Names of high potential employees will then be forwarded to senior management for consideration and approval. Positive job performance, a strong mission focus and demonstrated potential for advancement will be considered as well as an assessment of the employee’s level of readiness. Once approved, the employee’s name will be added into the succession plan. A development plan including goals and objectives will be drafted with the input of the employee and their supervisor.

During the course of the year, regular feedback and coaching from the supervisor will take place, as well as a formal year-end discussion to summarize performance accomplishments and development progress. Follow-up action for employees identified in previous succession plans will be noted and may involve a broadening of responsibilities or inclusion of new assignments.

If no internal candidates are identified or candidates are not ready for a particular position, the succession plan may identify a need for outside hires to be considered.

The facility succession plan will be formally updated each year by senior management following the completion of annual performance appraisals in April. The updated succession plan will be completed by June 1st of each year.