



Procedure for Performance Partnership Planning (myP3)

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| Parent Policy: | None | | |
| Procedure Reference: | | | |
| Procedure Sponsor: | AVP People Service | | |
| Procedure Contact: | Manager, Talent Acquisition, Learning & Wellbeing | | |
| Stakeholders: | Support and Exempt Employees, Managers and Leaders | | |
| Approved by: | Executive Committee | | |
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| Last reviewed: | March 7, 2024 | Scheduled review date: | July 2024 |

1. Purpose

Okanagan College employees deliver the highest quality of work to fulfill its mandate and commitments. The purpose of the Performance Partnership Plan (MyP3) is to provide structure that supports the alignment of employees' work with College and Department goals, which in turn contributes to the College's overall success. This Procedure also supports career navigation and development for employees and succession planning for the College. All employees of the College are responsible for achieving their performance goals in alignment with the mission, vision, values, plans, and policies of the institution, their job duties, and in compliance with the applicable agreements, regulations, and laws.

2. Scope

This Procedure covers all exempt employees, and BCGEU support employees.

3. Guiding Principles

- 3.1** The College endeavors to provide communication, resources, and leadership to inspire, engage and support employees to achieve their performance and learning goals.
- 3.2** Supervisors provide leadership and management to support employee performance and development, to achieve department goals. Supervisors work in partnership with employees throughout the Performance Partnership Plan process.
- 3.3** Employees own their own performance and their behaviour. Employees are expected to achieve performance goals in keeping with the College's values and competency expectations related to their job.

- 3.4** A “no surprises” approach is critical to effective Performance Partnership processes. If the supervisor has issues or concerns with an employee’s performance they should raise this with the employee in a timely manner, and should not wait for the mid-year or annual review meeting.

4. Definitions

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|-------------------------------------|---|
| Competencies | Means the skills, abilities and behaviours that employees are asked to demonstrate when completing performance goals, and may also mean Okanagan College’s Competency Framework |
| Employee | Means any person employed as an exempt or excluded employee and any person employed under the BCGEU Support Staff Collective Agreement. |
| Integrated Resource Planning | Means the process through which the College assigns financial resources to Departments. |
| MyP3 | Means the Performance Partnership Plan. |
| Performance Goals | Means a measurable goal that the employee commits to achieving that supports the goals of the department and/or the College. |
| Performance Partnership Plan | Means the process and associated forms detailed in this Procedure. |
| Supervisor | Means the person who is responsible for managing and supporting the employee’s performance and for conducting the performance review process. |

5. Roles & Responsibilities

- 5.1** MyP3 is a shared responsibility between a supervisor and employee.
- 5.2** Supervisors are responsible for setting performance expectations and providing support and guidance to employees. The Performance Partnership Plan (myP3) form assists with facilitating this process.
- 5.3** Employees are responsible for achieving performance outcomes and demonstrating Okanagan College competencies. Employees are responsible for communicating when they require support and guidance from their supervisor.

6. Four Step Performance Partnership Plan Process

6.1 Step 1: Communicating Department and College Priorities & Goals

- Department and College priorities and goals are communicated to the team.
- Supervisors identify priorities and goals that will be cascaded to the applicable employees. By cascading the College’s strategic goals into departmental goals and then individual performance goals, the College ensures that everyone is working towards the same overall objectives, and that there is a clear connection between an employee’s job performance and the achievement of the College’s strategy and goals.
- Department goals and priorities will be shared with other departments within the College through the Integrated Resource Planning process.

6.2 Step 2: Getting Started, and Goal Setting (May 1 – June 30):

- a) Supervisors begin discussing performance and learning goals with their department and with employees once the previous year's performance review has been completed.
- b) Supervisors and employees use the applicable MyP3 form to guide and capture performance for upcoming the year, depending on the job role the employee is in the competencies included in the assessment section will be different:
 - i. **Section 1 -Getting Started (Optional for employees to complete)**

Employees are invited to complete Section 1 of the My3 form and to send to their manager prior to setting performance and learning goals for the year. This is an opportunity for employees to share what work inspires them, identify their career aspirations, indicate what support they are looking for, and to ask questions about the department and College priorities and strategies. Employees should also be asked to review the competency self-evaluation section of the form, as this will also help the employee and Supervisor to identify appropriate development activities for the employee.
 - ii. **Section 2: Goal Setting & Review (to be completed by June 30)**

In this section, supervisors lead the conversation with employees to identify performance goals, review the Okanagan College competencies, and identify learning and development goals for the year. Goals should be based on the employee achieving goals and performance standards, as this is the performance standard expected of all employees.
- c) Performance Assessment Scale is detailed below and supervisors should review the assessment scale with employees at the outset so there is an understanding of how performance goals and competencies will be assessed:

Does Not Meet: Performance is below the normal expectations for a substantial number of goals and requirements of the job. Competencies are not demonstrated at a satisfactory level.

Partially Meets / Developing: Meets some performance goals. Performance is not at the quality level required and/or is not always delivered on time. Displays some competencies and is still developing. This rating may be applicable to employees who are in the first year or two of appointment to a new position.

Achieves goals and performance standards: Work is of good quality and fully meets the performance standards and expectation of the role. All position responsibilities are met. Competencies are actively demonstrated and are well developed. Essentially this rating is for employees who are doing everything that is required of them in their role and making a significant contribution to the work of the College.

Exceeds goals and performance standards: Work is consistently executed on or before it is due and at an exceptional level of performance, making major contributions to the success of the department and/or the institution.

Goals are exceeded by a significant degree. All competencies are demonstrated in an outstanding manner.

d) **Setting Performance Goals (Section 2A of the myP3 Form)**

Performance goals capture key accountabilities of the employee's position.

- a. For Support Staff, identifying 1 to 3 performance goals is recommended as job tasks are typically clearly defined.
- b. For Exempt Staff, identifying 3 to 6 performance goals is recommended.
- c. To write performance goals, it is recommended to use the SMART method:
 - **S**pecific: (simple, sensible, significant)
 - **M**easurable (quantitative and/or qualitative) *
 - **A**chievable (agreed, reasonable, attainable)
 - **R**elevant (results-based, aligned with overall objectives)
 - **T**imely. (time-based, time limited, time/cost limited, timely, time-sensitive)

d) **Measuring Performance Goals**

Thought needs to be given when goals are being set as to how that goal can be measured:

- i. Quantitative measures are objective measures of progress towards or completion of a goal or milestone. They may be binary (e.g. incomplete/complete) or continuous (e.g. a scale). Quantitative measures enable fair and transparent observations that are verifiable by others. They tend to be stated as a target or a specific level of achievement to be completed. Quantitative measures can tell you "how many," "how much," or "how often."
- ii. Qualitative measures are used when quantitative measures cannot be used and tend to be written as observations and are narrative in nature. Qualitative goals tend to focus on improvement of an experience or satisfaction of students, employees, clients, and/or community partner.
- iii. Competencies are designed to be observable behaviours, and both employees and supervisors should be able to provide concrete examples of how a specific competency has been demonstrated.
- iv. Ratings and comments in Section 3 are completed at the end of the performance year.

e) **Assessing Competencies (Section 2B of the MyP3 Form)**

The Okanagan College Competencies reflect the values of the College and outline the skills, abilities and behaviours that employees are asked to be demonstrated when completing performance goals. Performance goals reflect "what" needs to be accomplished, and competencies reflect "how" the goals should be achieved.

- a) Supervisors review the competencies with their employees as part of the goal setting and learning & development planning process. It is important for employees to understand that the competencies reflect the values of the College and describe the skills, abilities and behaviours employees are asked to demonstrate to be successful in their position. The competencies are grouped into the following categories:

- Results Focused
- Leadership & Connection
- Innovation & Change Adept
- Indigenous Cultural Awareness
- Integrity & Respect

For each of the competencies, there are descriptors. Competence descriptors are positively formulated statements that describe observable behaviours and desired skills and abilities required to achieve the required level of proficiency for each competency. Although all positions at the College have the same core competencies, the descriptors are adjusted based on the increase in leadership responsibility.

- b) Where supervisors and employees identify areas of development and growth, learning goals should be identified. All employees have areas where further development and growth is beneficial, and the Okanagan College Competencies help inform where those areas of growth may be.
- f) **Learning & Development (Section 2C of the MyP3 Form)**
Employees can enhance their skills, abilities, and behaviours through both formal and informal learning. Formal learning is structured and is often facilitated through course or program offerings. Informal learning comes in many forms, including viewing videos, self-study, reading articles or books, participating in forums or committees, volunteering, having a mentor etc. Both types of learning are encouraged at Okanagan College.
- a) Supervisors and employees work together to identify learning goals that support the employee's development and growth.
 - b) These goals are captured in section 2C of the myP3 plan.
 - c) Supervisors and employees should review and adjust learning goals as needed throughout the year.

6.3 Step 3: Mid-Year / Mid-way Check-In (November 1 – 31)

Supervisors are expected to share information, provide coaching, guidance, and constructive feedback when required, and readily give recognition for good performance throughout the year. Employees are expected to complete performance and learning goals as well as demonstrating the competencies identified in their MyP3 plan. If employees require support or encounter challenges, they should contact their supervisor immediately.

- a) Supervisors conduct a mid-year / mid-way check in with their employees. This is done by meeting with the employee, reviewing performance and learning goals, and then capturing progress that has been made. If there are areas that require attention, this should be discussed with the employee and noted in the Manager Comment section. Employees can provide their comments in the Employee Comment section. Reminder that employees should be given 5 days to provide any final comments once the mid-year / mid-way check in meeting has occurred.
- b) Mid-year / mid-way check-ins should be done mid-way through the performance year. For annual reviews, this means that mid-year reviews are to be done by November 31.

6.4 Step 4: Annual Review (April 1 to June 30)

- a) Prior to the annual performance review meeting, employees are invited to provide their initial comments on their performance and learning progress in the Employee Comment sections. These sections are identified in green and where it states, "Employee Comments". These are the employee's initial comments as employees will be allowed to finalize their comments within 5 days of receiving the final annual review.
- b) Employees should also complete their year-end assessment of their level of competence with respect to the Okanagan College competencies.
- c) The supervisor then completes Section 2 in the employee's myP3 form. Supervisors do this by:
 - i. Identifying a rating by each performance goal, and provide comments to support the rating (Section 2A);
 - ii. Identifying if a learning goal has been completed or not (Yes/No). Note: learning goals are not a factor in determining the overall performance rating.
- d) Supervisors meet with employees to review their performance for the performance review period.
- e) Following this meeting the Supervisor will complete the overall performance rating for the performance period, providing comments in the "Manager Comments" section (Section 3).
- f) If the performance assessment rating is "Does Not Meet" expectations, managers are asked to connect with their People Services Business Partners to discuss options for supporting the employee to improve their performance.

6.5 Completing the Form and Informing Employees of their Performance Assessment

- a) For exempt and excluded employees only, the proposed overall performance ratings are submitted by the Dean, Director, or AVP to the applicable Vice President or President for approval before the employee is informed of the overall performance assessment.
- b) Employees are then provided with a copy of the completed MyP3 form, showing their overall performance assessment rating and should be given 5 working days to review and provide their signature and any final comments.
- c) When the form is fully complete the supervisor retains the original form and sends a PDF copy of the completed MyP3 form to the employee.
- d) The supervisor also submits a copy of the completed form to their People Services Business Partner using the applicable Etrieve form.

6.6 Step 5 – Performance Based Increases Exempt & Excluded Employees

For exempt employees only, the final stage is the determination of their annual salary increase in accordance with the Okanagan College Procedure for Exempt Employee Compensation and Classification.

6.7 BCGEU Support Staff Timeline

The Performance Partnership process and MyP3 forms should be used for all BCGEU Support Staff, however the timeline may vary depending on the needs of the Department. For example the review period may be based on an employee's anniversary date, or another timeline that better reflects the workflow of the Department.

6.8 Process Summary

Appendix 1 summarizes the process and timeline for ease of reference.

7. Probation Period

Supervisors are asked to conduct probationary reviews using the MyP3 form and following the same guidance as noted above. Exempt employee probation period is 1 year, and support staff probation period is 910 hours. Probation performance goals must be established within 30 days of the employee's start date with the College. The mid-way check-in is done when the employee has been in their role half-way through the probation period and the final review is done at the end of their probationary period. After the probationary period, the employee is on the regular performance cycle.

8. Performance Not Meeting Expectations

Supervisors are expected to provide constructive feedback and address performance issues as they arise. Doing so will often correct the performance problem. Supervisors are encouraged to connect in with their People Services Business Partner for support as soon as they identify an ongoing performance issue.

9. Appeal Process

- 9.1 All employees should first raise concerns with their supervisor if they disagree with a performance assessment. In the majority of cases constructive discussions between the employee and their supervisor should result in a resolution of the concerns.
- 9.2 BCGEU Support Staff can use the grievance process set out in the Collective agreement if they are unable to resolve their concerns with their supervisor.
- 9.3 Exempt and Excluded Employees should refer the matter to their supervisors Manager if they are unable to resolve their concerns with their supervisor.

10. Related Acts and Regulations

College and Institute Act

11. Supporting References, Policies, Procedure and Forms

Okanagan College Inspire Plan
BCGEU Support Staff Collective Agreement
Exempt and Excluded Employee Terms and Conditions
9.03 Procedure on Discipline and Termination
Procedure for Exempt Employee Compensation and Classification
Performance Partnership Form Employees
Performance Partnership Form Supervisors
Performance Partnership Form Senior Leadership

History / Revisions

| Date | Action |
|------------|--|
| 2023-03-23 | <i>New Procedure Approved by Executive Committee</i> |

Appendix 1

Performance Partnership Planning Process at a Glance

