



Employee Review & Planning Program

ERPP: Step by Step Guide

Program Overview

MILESTONE	TARGET COMPLETION DATE	TOOLS REQUIRED	WHO/ RESPONSIBILITIES
Departmental Goals Determined	January – March	<ul style="list-style-type: none"> Departmental Goal Setting Tool Existing Departmental Goals/ Strategic Plans 	Department Senior Management Team
Pre-Introduction Meeting Planning - “The Homework Step”	February – April	<ul style="list-style-type: none"> S.M.A.R.T. Goals Worksheet Development Goals Annual Review Form Departmental Goals/ Plan 	Employee (Goals, Challenges) Manager (Job Description/ Expectations/ Book Meeting)
Introduction Meeting	April	<ul style="list-style-type: none"> Annual Review Form Departmental Plan 	Manager Employee – Attends Prepared
6-Month Review	October/ December **Date to vary based on Introduction Meeting Date.	<ul style="list-style-type: none"> Annual Review Form Departmental Plan 	Manager – Books Meeting Employee – Attends Prepared
Annual Review	April/ June **Date to vary based on 6-Month Meeting Date.	<ul style="list-style-type: none"> Annual Review Form SMART Goals Worksheet 	Manager – Books Meeting Employee – Attends Prepared

Step by Step Cycle:

STEP 1: DETERMINE DEPARTMENTAL GOALS

Tools Required: Departmental Goal Setting Tool/ Departmental Goals

1. Department Senior Management Team determines and communicates a minimum of 2 – 3 strategic priorities and/ or goals for the calendar year.

2. Managers ensure each Support Staff member on their team has access or a copy of the departmental goals.

Note: Contact your HR Consultant/Advisor for a Departmental Goal Setting Tool.

STEP 2: PRE-INTRODUCTION MEETING PLANNING - “THE HOMEWORK STEP”

Tools Required: Departmental Goals Goals & Development Form

Pre-Introduction Meeting Planning for the Manager

- Ensure employee has a copy of the Department’s Goals.
- Schedule the Introduction Meeting with your Employee (s).
- Review Employee’s Job Description and the Performance Rating Factors (as found in Part 3 (a) of the Annual Review Form) to ensure accuracy of the Job Description and to prepare to discuss with the employee what is going well and areas of opportunity.

Pre-Introduction Meeting Planning for the Employee

- Using the Annual Review Form and the SMART Goals Worksheet, develop 1 -2 Work Goals and 1-2 Development Goals using the SMART Goals Worksheet.
- Think about and record in Part 1 (c) challenges which may prevent you from attaining your goals.
- Access an electronic copy of the Goals & Development Form online at: <http://www.tru.ca/hr/erpp.html> or contact your HR Consultant/Advisor.

Note: The Annual Review Form is deemed a “working document” which is reviewed and revised by the Manager and Employee until submitted electronically to HR at completion of the Annual Review cycle.

STEP 3: THE INTRODUCTION MEETING

Tools Required: Departmental Goals Goals & Development Form

1. Manager reviews ERPP Process and Departmental Goals with the Employee.
2. Manager collaborates with the Employee to set S.M.A.R.T Work and Development Goals, as well as identify challenges that may prevent the Employee from attaining their goals.
**This component is to be documented by the Employee on Part 1 (a, b, c) of the Annual Review Form.
3. Manager will review expectations and responsibilities using the Employee’s Job Description and the Rating Performance Factors found in Section 3 (a) of the Annual Review Form.
4. Schedule the 6-Month Review.

Suggestion: Use Outlook appointment Requests to pre-set your ERPP Meetings.

STEP 4: THE 6 MONTH REVIEW

Tools Required: Annual Review Form

- Manager and Employee review goals and adjust, modify or create new goals if necessary. For example, a timeline is no longer realistic or the employee completes a goal (s) earlier than anticipated.
- Manager and Employee collaborate on accomplishments/ progress on goals made to date.
- Employee documents discussion on Section 2 of the Annual Review Form.
- Schedule the Annual Review Meeting.

STEP 5: THE ANNUAL REVIEW

Tools Required: Annual Review Form SMART Goals Worksheet

- Manager and Employee review goals and take note of accomplishments.
- Manager evaluates the Employee's development and progress based on the expectations and rating factors, as mutually agreed upon at the Introduction and 6-Month Meeting.
- Discussion and collaboration on goals for the following year.
- Manager and Employee record discussion and complete final review of the Goals & Development Form and sign off on Page 5.
- Schedule the 6-Month Review for next yearly Cycle.

STEP 6: FORM SUBMISSION TO HUMAN RESOURCES

- With Employee and Manager signatures complete, the **Annual Review Form must be submitted to Human Resources** for tracking and record-keeping purposes.
- Forms can be submitted:
 - Electronically – Manager to scan and send a copy to their appropriate HR Advisor.
 - Interoffice Mail – Manager to send completed ERPP form to Human Resources, attention appropriate HR Advisor.
- Managers and Support Staff may retain copies of ERPP Forms for Employee Review purposes only. Related ERPP documents are to be stored in a secure, confidential location at all times.

Program Leads

If you encounter a question or concern as you work through the ERPP Program, please contact your HR Consultant/Advisor.

Larry Phillips	Associate Director, Human Resources	lphillips@tru.ca
Jennifer Billingsley	HR Consultant	jbillingsley@tru.ca
Bernie Mahoney	HR Consultant	bmahoney@tru.ca
Sandy Scarff	HR Consultant	sscarff@tru.ca
Amanda Ellison	HR Consultant	aellison@tru.ca