



INSTRUCTIONS FOR COMPLETING THE PUBLIC SERVICE PERFORMANCE AGREEMENT FOR EMPLOYEES

Office of the Chief Human Resources Officer (OCHRO)
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Introduction

Employees who do not have access the Public Service Performance Management (PSPM) application and their managers are still required to participate in the performance management program. A paper-based performance agreement is available to record work objectives, track progress and assessments. Additional information on the performance management process is available on the [GCintranet](#).

Unless otherwise specified, either the manager or the employee can complete the sections of the performance agreement.

Section A – Personal Information

This section captures basic information on the employee, their immediate manager, and the employee’s position during the performance management cycle. Responses in this section will determine which other sections of the performance agreement will need to be completed for each employee.

EMPLOYEE INFORMATION

- Enter employee and manager information for all mandatory fields.
- Employees in the SERES classification must also complete Section H: Career Progression Management Framework for Federal Researchers.

DEPARTMENTAL FISCAL YEAR

- Enter the appropriate dates for your organization.

PROBATION

- Indicate whether the employee is on [probation](#) or not.
- Employees on probation and their managers must also complete Section I: Probation.

PERFORMANCE IMPROVEMENT PLAN

- Indicate whether or not a [performance improvement plan](#) is being carried over from the previous performance cycle.
- Indicate whether or not the employee requires a performance improvement plan for the current performance cycle.
- By selecting yes for either option, Section F: Performance Improvement Plan must be completed.

TALENT MANAGEMENT PLAN

- Indicate whether or not a [talent management plan](#) is being carried over from the previous performance cycle.
- Indicate whether or not the employee requires a talent management plan for the current performance cycle.
- By selecting yes for either option, Section G: Talent Management Plan must be completed.

LEARNING AND DEVELOPMENT PLAN

- Indicate whether the employee is completing their [learning and development plan](#) in the performance agreement or using a separate, organizational approved template.
- By selecting yes, Section D: Learning and Development Plan must be completed.
- If the employee is retiring within the fiscal year, on extended leave or another specified reason, Section D: Learning and Development Plan does not need to be completed.

EMPLOYMENT STATUS

- Indicate the appropriate employment status of the employee.
- For term employees, indicate the beginning and end dates of the term.
- For employees on acting assignment, indicate the beginning and end dates of the acting assignment.
- For employees on assignment, indicate the beginning and end dates of the assignment.
- For employees on secondment from another organization, indicate the home and host organizations and the beginning and end dates of the secondment.
- For other special circumstances, specify the status and indicate the beginning and end dates of the other circumstances.
- Note more than one of the sub-sections can be completed to identify the employee's status.

UNREPRESENTED/EXCLUDED

- If applicable, indicate if the employee's position is unrepresented or excluded.
- If the position is unrepresented or excluded, indicate if the employee is [eligible for performance pay](#).

OFFICIAL LANGUAGES

- Indicate the employee's first official language.
- For bilingual positions, indicate the linguistic profile of bilingual positions.
- Indicate whether or not the employee meets the second language requirements of the position.
- Indicate the expiry dates, if applicable, of the employee's second language evaluation results.

POSITION REQUIREMENTS

- Indicate if the position requires valid delegated authority.
- If yes, indicate if the employee has valid delegated authority.
- Indicate if the position has supervisory responsibilities including evaluating employee performance.
- If yes, indicate if the employee has completed Performance Management for the Government of Canada (G140).

Section B – Work Objectives

BEGINNING OF THE PERFORMANCE CYCLE

In the first three columns of Section B:

- Indicate how the employee’s work is linked to higher level team or organizational priorities or deliverables.
- Create 3 to 6 [work objectives](#).
- Create performance indicators or standards for each work objectives.

MID-YEAR REVIEW

In the fourth column in Section B:

- For each work objective, managers must indicate the employee’s status against the established work objectives by selecting one of the 4 options.
- Work objectives and performance indicators or standards can be updated or added to reflect changes to the employee’s work or priorities.
- Comment boxes are available for the manager and the employee to add additional information.

YEAR-END ASSESSMENT

In the fifth column and Work Objective Rating Definitions in Section B:

- For each work objective, managers must complete a narrative assessment of the employee’s accomplishments.
- Managers must select a rating that reflects the overall assessment of the employee’s performance and is supported by the narratives provided.
- Comment boxes are available for the manager and the employee to add additional information.

Section C – Competencies

BEGINNING OF THE PERFORMANCE CYCLE

the core competencies are pre-populated in column 1 of Section C. No actions are required unless additional [competencies](#) are being added to the employee's performance agreement.

- Add additional competencies using the text fields in the Functional and Technical fields.

MID-YEAR REVIEW

Within column 2:

- For each core competency, the manager must indicate if the employee is on track, needs improvement or not applicable.
- Comment boxes are available for the manager and the employee to add additional information.

YEAR-END REVIEW

Within column 3:

- For each core competency, the manager must provide a narrative assessment of the employee's demonstration of the competency.
- Managers must select a rating that reflects the overall assessment of the employee's competency demonstration and is supported by the narratives provided.
- Comment boxes are available for the manager and the employee to add additional information.

Section D – Learning and Development Plan

The learning and development plan can be updated at any time during the performance cycle.

For each learning activity:

- Select the learning category by selecting one of the options.
- Describe the learning objective.
- Identify the learning activity.
- Identify the cost of the activity. If no cost, enter zero (0).
- Identify the time, in hours for the activity.
- Identify any travel costs associated with the activity. If no cost, enter zero (0).
- Indicate the [type of learning activity](#) by selecting one of the options.
- Indicate the status of the activity and update as required.
- Comment boxes are available for the manager and the employee to add additional information.

Section E – Signatures, assessment and attestation

BEGINNING OF THE PERFORMANCE CYCLE

- Once Sections B, C and D (if applicable) are completed, the manager must confirm that a discussion has taken place with the employee by selecting the appropriate option and then signing and dating the agreement.
- The employee must confirm that a discussion has taken place with the manager by selecting the appropriate option and then signing and dating the agreement.
- If applicable in the organization, the employee attests whether or not they are compliant with the Values and Ethics Code.
- Comment boxes are available for the manager and the employee to add additional information.

MID-YEAR REVIEW

- Once Sections B, C and D (if applicable) are completed, the manager must confirm that a discussion has taken place with the employee by selecting the appropriate option and then signing and dating the agreement.
- The employee must confirm that a discussion has taken place with the manager by selecting the appropriate option and then signing and dating the agreement.
- Comment boxes are available for the manager and the employee to add additional information.

YEAR-END REVIEW

- Once Sections B, C and D (if applicable) are completed, the manager must enter the overall performance rating using the [grid](#) provided. If unable to assess, the manager must specify the reason.
- The manager confirms that a discussion has taken place with the employee by selecting the appropriate option and then signing and dating the agreement.
- The employee must confirm that a discussion has taken place with the manager by selecting the appropriate option and then signing and dating the agreement.
- The employee may indicate whether or not the performance discussions were conducted in their preferred official language.
- Comment boxes are available for the manager and the employee to add additional information.

Section F – Performance Improvement Plan (as required)

INITIATING A PERFORMANCE IMPROVEMENT PLAN

- The manager must indicate the date the plan is initiated on.
- The manager must specify the desired outcome of the plan.
- Following a discussion of the plan, the employee must acknowledge the discussion by indicating the date it took place and signing.
- The manager must also sign and date the plan.

For each area of improvement, the manager must:

- Identify the work objective or competency where improvement is required.
- Specify the areas for improvement.
- Identify the actions required to meet the desired outcome of the action plan.
- Identify the person responsible for each action.
- Specify the performance indicators or standards to be met by the employee.
- Indicate the timeline for meeting the performance indicators or standards.
- Indicate the employee's progress by selecting one of the options.
- The employee must confirm that a discussion has taken place with the manager by selecting the appropriate option and then signing and dating the agreement.
- Assess the employee's improvement at the established deadline by selecting one of the options.

Comment boxes are available for the manager and the employee to add additional information.

CLOSURE OF A PERFORMANCE IMPROVEMENT PLAN

- The manager provides a narrative detailing the employee's results at the established deadline.
- The employee signs and dates the action plan.
- The manager signs and dates the action plan.
- The employee must confirm that a discussion has taken place with the manager by selecting the appropriate option and then signing and dating the agreement.
- Comment boxes are available for the manager and the employee to add additional information.

Section G – Talent Management Plan (as required)

SUB-SECTIONS OF THE TALENT MANAGEMENT PLAN

Employee consent

- The employee indicates his or her consent to the talent plan. If the employee does not consent, the talent management plan is closed and no other fields need to be completed.

Employee information

- Complete the required information.

Date the plan was established

- Indicate the date the plan was established.

Previous year's performance ratings

- If available, indicate the employee's past performance ratings.

Employee's current linguistic profile

- Indicate the employee's first official language.
- Indicate the employee's second language evaluation results.
- If applicable, indicate other languages the employee has proficiency.

Employee's educational profile (to be completed by the employee)

- Indicate educational achievements and the related areas of study.
- Specify any professional designations, affiliations and certifications.
- Specify volunteer experience.
- Specify awards received.
- Specify work accomplishments and strengths.

Employee's mobility preferences (to be completed by the employee)

- Indicate willingness to relocate within Canada, if yes indicate where.
- Indicate willingness to relocate outside of Canada.
- Specify any mobility considerations.

Employee's career interests (to be completed by the employee)

- Indicate interest in staying in current position, if yes specify interests.
- Indicate interest in another position at level. If yes indicate in current organization or in another organization and specify details.
- Indicate interest in advancing to the next level in current occupational group. If yes indicate in current organization or in another organization and specify details.

- Indicate interest in moving to another occupational group. If yes indicate in current organization or in another organization and specify details.
- Indicate interest in working outside of the federal public service. If yes, specify details.

Desired outcome of talent management plan

- Specify the goal of the talent management plan.

DEVELOPMENTAL PLAN ITEMS

For each plan item:

- Specify the objective.
- Specify the activity.
- Indicate the [type of activity](#) by selecting one of the options.
- Identify the person responsible for the activity.
- Identify the cost of the activity. If no cost, enter zero (0).
- Identify the time, in hours for the activity.
- Identify any travel costs associated with the activity. If no cost, enter zero (0).
- Indicate the target completion date.
- Indicate the status of the activity.
- Comment boxes are available for the manager and the employee to add additional information.

CLOSURE OF THE TALENT MANAGEMENT PLAN

- The manager indicates if the desired outcome of the plan has been met.
- The manager indicates if the plan is no longer required and specifies the reason.
- The manager indicates the date the plan is closed.
- Comment boxes are available for the manager and the employee to add additional information.

Section H – Career Progression Management Framework for Federal Researchers (RE Framework)

EMPLOYEE PROFILE (TO BE COMPLETED BY THE EMPLOYEE)

- Indicate whether or not the employee will be seeking a review.
- Indicate when the employee’s dossier was last reviewed.
- Indicate when the employee was last promoted.

ATTESTATION

- The employee attests that a discussion has taken place, then signs and dates the attestation.
- The manager attests that a discussion has taken place, then signs and dates the attestation.

CAREER DOSSIER

- To be completed by the employee.

COMMENTS

- Comment boxes are available for the manager and the employee to add additional information.

Section I – Probation (as required)

PERIOD OF PROBATION

- The manager specifies the beginning and end date of the employee’s probation period.

DEVELOPMENTAL PROGRAM

- If applicable, the manager specifies the details of the developmental program the employee is participating in and the related probation conditions.

PROBATION COMPLETED

- The manager confirms the probation period has ended and indicates whether or not the employee has successfully completed his or her probation and enters the date.
- Comment boxes are available for the manager and the employee to add additional information.