



## Pan-Canadian Health Promoter Competencies' Toolkit: Sample Performance Appraisal Template

### Introduction

The performance assessment is an opportunity to review, summarize and highlight the employee's performance over the review period. This template, developed by the Pan-Canadian Health Promoter Competencies initiative, is provided as an example of how the health promoter competencies can be utilized as the basis of the performance assessment. Doing so assumes that the position description and/or performance expectations for the employee are based on the health promoter competencies. The template can be adapted as needed for individual position and organizational contexts.

The template's structure provides for a self-assessment step, which is a typical part of most performance appraisals. Self-assessment of performance can assist the employee's preparation for the appraisal meeting, identify performance examples that the supervisor may not have recalled, and can help identify gaps between employee's self-perceptions and the views of the supervisor. Examples linked to those provided in the *Health Promoter Position Profile* have been inserted for the first three domains.

Health promotion work often calls upon competencies from multiple domains. To address this reality, employees and supervisors have the option to:

- a. Recognize the work in more than one competency domain
- b. Split the work into smaller units that align with competency domains
- c. Put the work into the category where most of the tasks fit.

It is also possible that the work being asked of an employee does not encompass a particular domain and the employee did not otherwise demonstrate these competencies. If this is the case, then it should be noted that assessment of this domain is not applicable for this review period and will be addressed in a future period. Note: since the set of health promoter competencies reflect

a collective inter-dependent 'package' of knowledge, skills and abilities, marking a domain as not applicable should only be done after careful consideration.

Following 'Employee Information', Section 1 focuses on the competency assessment and requests supporting evidence for ratings. Section 2 provides a summary template to identify strengths and areas for potential development. Section 3 is a summary section to provide the overall performance rating and development objectives for the upcoming period.

### **Instructions**

1. Supervisor: complete the 'Employee Information' section and provide the tool to the employee.
2. Employee: complete Section 1 of the tool and return to the supervisor.
3. Supervisor: review Section 1 self-assessment ratings and examples. Identify where there is a significant discrepancy between parties in their assessments. Identify examples, as needed.
4. Joint: meet to review and discuss the assessment and examples – particularly where discrepancies exist. Summarize results in Section 2 to record the final rating for each domain and the expected level for the position.
5. Supervisor: complete Section 3 including overall performance comments and agreed to development plan for the upcoming period.
6. Employee: includes comments
7. Both: sign and date.

## Employee Information

Employee Name		Employee Number		Position Title	
Department		Division		Review Period End	(YYYY/MM/DD)
Review Type	<input type="checkbox"/> Annual Review <input type="checkbox"/> Interim Review <input type="checkbox"/> Probationary Review				

## Section 1 – Competency Assessment

<p><b><u>Domain 1 – Health Promotion Knowledge and Skills</u></b></p> <p>1.1 Apply a population health promotion approach, including determinants of health and health equity, to the analysis of health issues.</p> <p>1.2 Apply health promotion principles, theory and research to:</p> <p>a) Identify options for health promotion action.</p> <p>b) Plan, implement and evaluate health promotion action.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p> <p><i>Sample text: Applied a comprehensive workplace health promotion model to the ** workplace identifying opportunities and barriers to increasing physical activity and healthy eating.</i></p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b><u>Domain 2 – Situational Assessments</u></b></p> <p>2.1 Retrieve and synthesize population health status information to describe the importance and underlying causes of a health issue.</p> <p>2.2 Access and critically appraise evidence (i.e. published and grey literature, systematic reviews, and promising practices) for potential health promotion action.</p> <p>2.3 Conduct an environmental scan to identify community perspectives, assets, resources, challenges and gaps.</p> <p>2.4 Interpret population health status information, evidence, and environmental scan findings to identify options for health promotion action.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p> <p><i>Sample text: Integrated health status information, existing evidence and best practices elsewhere to describe program/policy options to improve action to support healthy eating and physical activity in area schools.</i></p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b>Domain 3 – Plan and Evaluate Health Promotion Action</b></p> <p>3.1 Develop a plan to implement health promotion action including goals, objectives, and implementation and evaluation steps.</p> <p>3.2 Identify and oversee resources (e.g., skills, personnel, partner contributions, budget) to develop, implement and evaluate sustainable health promotion action.</p> <p>3.3 Monitor and evaluate the implementation of health promotion action.</p>	<p><b>Rating</b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b>Supporting Evidence - Employee</b> (include example):</p> <p><i>Sample text: Contributed to development of team's workplace program plan and routinely monitor achievement of expected targets (e.g., vendor food policies, use of stair prompts)</i></p>	
<p><b>Supporting Evidence - Supervisor</b> (include example):</p>	

<p><b><u>Domain 4 – Policy Development and Advocacy</u></b></p> <p>4.1 Describe the potential implications of policy options (i.e., health, economic, administrative, legal, social, environmental, political and other factors, as applicable).</p> <p>4.2 Provide strategic policy advice on health promotion issues.</p> <p>4.3 Write clear and concise briefs for health promotion issues.</p> <p>4.4 Apply understanding of the policy making process to assist, enable and facilitate the community to contribute to policy development.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b><u>Domain 5 – Community Mobilization and Building Community Capacity</u></b></p> <p>5.1 Develop relationships and engage in a dialogue with communities based on trust and mutual respect.</p> <p>5.2 Identify and strengthen local community capacities to take action on health issues.</p> <p>5.3 Advocate for and with communities to improve their health and well-being.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b><u>Domain 6 - Partnership and Collaboration</u></b></p> <p>6.1 Establish and maintain linkages with community leaders and other key health promotion stakeholders (e.g., schools, businesses, local governments, faith groups, non-governmental organizations, etc.).</p> <p>6.2 Utilize leadership, team building, negotiation and conflict resolution skills to build community partnerships.</p> <p>6.3 Build and support coalitions to stimulate intersectoral collaboration on health issues.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	



<p><b><u>Domain 7 - Communication</u></b></p> <p>7.1 Provide information tailored to specific audiences (e.g., professional, community groups, general population) on population health status and health promotion action.</p> <p>7.2 Apply communication methods and techniques to the development, implementation and evaluation of health promotion action.</p> <p>7.3 Use the media, information technologies, and community networks to receive and communicate information.</p> <p>7.4 Communicate with diverse populations in a culturally-appropriate manner.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence - Employee</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b><u>Domain 8 – Diversity and Inclusiveness</u></b></p> <p>8.1 Recognize how the determinants of health (biological, social, cultural, economic and physical environments) influence the health and well-being of specific population groups.</p> <p>8.2 Address population diversity when planning, implementing, adapting and evaluating health promotion action.</p> <p>8.3 Apply culturally-relevant and appropriate approaches with people from diverse cultural, socioeconomic and educational backgrounds, and persons of all ages, genders, health status, sexual orientations and abilities.</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

<p><b><u>Domain 9 – Leadership and Building Organizational Capacity</u></b></p> <p>9.1 Describe the context of health promotion structures and roles at different jurisdictional levels.</p> <p>9.2 Describe how the work of health promotion supports the organization’s vision, mission and priorities.</p> <p>9.3 Contribute to developing key values and a shared vision in planning and implementing health promotion action in the community.</p> <p>9.4 Demonstrate an ability to set and follow priorities, and to maximize outcomes based on available resources.</p> <p>9.5 Contribute to maintaining organizational performance standards.</p> <p>9.6 Manage self, others, information and resources in an ethical manner.</p> <p>9.7 Contribute to team and organizational learning in order to advance health promotion goals (e.g., mentor students and other staff; participate in research and quality assurance initiatives).</p> <p>9.8 Pursue lifelong learning in the field of health promotion (e.g., professional development; practice development).</p>	<p><b><u>Rating</u></b></p> <p><u>Consistently</u> demonstrated application of these competencies in:</p> <p><input type="checkbox"/> Not demonstrated during this period (0)</p> <p><input type="checkbox"/> Simplest situations; require close and extensive guidance (1)</p> <p><input type="checkbox"/> Routine/somewhat difficult situations; require frequent guidance (2)</p> <p><input type="checkbox"/> Difficult/considerably difficult situations; require occasional/infrequent guidance (3)</p> <p><input type="checkbox"/> Exceptionally difficult situations; provides expert guidance to others (4)</p> <p><input type="checkbox"/> Expected work does not include this domain <u>and</u> employee did not otherwise demonstrate these competencies – to be addressed in future period (0)</p>
<p><b><u>Supporting Evidence</u></b> (include example):</p>	
<p><b><u>Supporting Evidence - Supervisor</u></b> (include example):</p>	

**Section 2 – Results Summary**

- In the following table, mark the final rating for each of the domains
- Include the target rating for current position
- Identify where employee meets, exceeds or falls short on each competency domain

Competency Level	1. Health Promotion Knowledge & Skills		2. Situational Assessments		3. Plan & Evaluate Health Promotion Action		4. Policy Development & Advocacy		5. Community Mobilization & Building Community Capacity		6. Partnerships and Collaboration		7. Communication		8. Diversity and Inclusiveness		9. Leadership & Building Organizational Capacity		
	Rating	Position	Rating	Position	Rating	Position	Rating	Position	Rating	Position	Rating	Position	Rating	Position	Rating	Position	Rating	Position	
1																			
2																			
3																			
4																			
0																			

**Section 3**

**List Other Significant Accomplishments Achieved During the Review Period**

**Overall Performance Rating and Supervisor Comments**

**Development Objectives for Upcoming Period**

Note: see *Individual Learning Plan & Learning Strategies* tools

**Employee's Comments**

**Signatures**

Supervisor		Date	
Employee		Date	