

<p>CODE-TITLE: HR-013: Formal evaluation process</p>	<p>DOCUMENT STATUS AND DATE: Reworked by HR hub in the fall 2016 and approved by Board March 20th, 2017.</p>
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POLICY/PROCEDURE:

COCO aspires to create the conditions where staff feels comfortable offering feedback to each other and the staff team and Board on a day-to-day basis. Nonetheless, giving and receiving feedback can be a stressful experience and we, as an organization, are committed to support staff in ways that makes sense and are guided by our values. The **purpose** of evaluation processes is to help us be more accountable to one another, grow in our jobs, nurture our feedback and learning culture and offer a satisfying and useful experience. Evaluations aims to provide the Board with structural issues they can to reflect and take action on when relevant.

We have 2 evaluation procedures. These will be referred to as the **Formal Evaluation** (done every year in November) and the **New Staff Evaluation** (included in a separate document).

THE FORMAL EVALUATION:

The Formal Evaluation process is modified when needed, but will involve feedback and discussion of the following areas:

- a. Qualities
- b. Satisfaction and Growth
- c. Performance
- d. Relationship
- e. Other Comments

2017 PERFORMANCE AREAS AT COCO

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| <ol style="list-style-type: none"> 1) Internal IT Coordinator 2) Commun-IT Development Coordination & Facilitation 3) Communications Coordination 4) Contract Coordination 5) Governance & Membership Engagement Coordination 6) Atelier /c Coordination | <ol style="list-style-type: none"> 7) Finance Coordination 8) Funding & Strategic Alliance Development 9) HR Coordination 10) Internal Project Support 11) Facilitation 12) Active Engagement in the Collaborative Structure of the Organization |
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COCO 2017 FORMAL EVALUATION PROCESS

COCO 2017 EVALUATION PROCESS

OUTPUTS FROM THIS PROCESS

- a) Several **evaluation meetings** between 2 people taking turns on 'being the person evaluated' and 'being the person offering evaluation feedback'.
- b) A **closure meeting** where staff share what they have heard and learned about themselves and others.
- c) An all **staff-follow-up meeting** where staff share their learning goals and the ways they wish to get support. The process is also reflected on.
- d) A **document** for each staff containing the feedback given, agreed upon learning goals and action items (dropbox)
- e) A **collection of issues** regarding structural health and performance of COCo, to be discussed by the Board

FORMAL EVALUATION MEETING PROCEDURE

- 1) The HR coordinator gets the ball rolling by introducing the evaluation policy and procedure: staff inputs on confirming the process, the individuals involved and the dates.
- 2) Evaluation forms are to be completed by all staff. When pertinent, Board members and/or COCo members/clients may also attend. Everyone will receive the evaluation form we agree to use. **See evaluation forms and job descriptions in the annex below.**
- 3) A 'speed-dating style evaluation meeting' will be held at a date determined by all staff. A 'speed-dating style meeting' refers to all staff meeting simultaneously in duo and swapping after 60 minutes. The staff member shares their self-evaluation first and then invites feedback from their peers, and vice-versa. This 4-5 hours meeting (approximately) can happen at any point between November 1st and December 15th over the course of 1 or 2 days. A closure meeting will follow the duo meetings to debrief how it went, and what staff heard and learned about themselves and the team.
- 4) At a staff meeting following the evaluation process, each employee is invited to present their learning goals and to name ways that COCo can support them in achieving those goals. The staff team will reflect on the process and collect any structural issues to report back to the Board:
 - a. Are there any issues related to the health and performance of COCo that you would like to comment on? (Governance, finance, fundraising and strategic alliances, HR, communications, contracts, collective management, Board roles and responsibilities?)
 - b. Are there any issues related to norms and accountability that you'd like to raise?
- 5) The final evaluation document with a summary of what was said and learning goals and for each staff member to fill in the HR dropbox folder.

SELF-EVALUATION FORM

Reflecting **on your own work** for the last year (responsibilities, roles, learning goals, job satisfaction, etc.), please respond to the following questions. This enables COCo's team to better support you in your position. Feel free to respond in either full sentences or in point form. See [the annex below](#) for relevant descriptions. This form will be useful in preparing for the learning goals and workplan development process.

- 1) **QUALITIES: WHAT IS YOUR OVERALL ASSESSMENT OF YOUR WORK IN THE LAST YEAR? WHAT QUALITIES DO YOU BRING TO COCo?**

- 2) **SATISFACTION AND GROWTH: IN THE LAST YEAR, WHAT WERE NEW LEARNINGS AND/OR SKILLS THAT YOU DEVELOPED?**

- 3) **PERFORMANCE: CAN YOU COMMENT ON YOUR OWN PERFORMANCE? WHAT ARE STRENGTH AREAS? WHAT AREAS COULD BE IMPROVED?**

- 4) **RELATIONSHIP: HOW IS YOUR WORKING RELATIONSHIP GOING WITH YOUR COLLEAGUES? WHAT DO YOU APPRECIATE OR WOULD WANT TO IMPROVE?**

- 5) **OTHER COMMENTS AND/OR FEEDBACK**

- 6) **IN THE FOLLOWING TABLE, PLEASE COMMENT ON YOUR OWN PERFORMANCE OVER THE PAST YEAR, REGARDING THE FOLLOWING [ATTRIBUTES AND RESPONSIBILITIES](#). CLICK THE TITLE OF EACH TO SEE THE DESCRIPTIONS IN THE ANNEX.**

ATTRIBUTE OR RESPONSIBILITY	COMMENTS
Collective management	
Leadership, initiative, creativity & vision	

<u>Communications</u>	
<u>Organization, problem-solving & decision making</u>	
<u>Competence, self-knowledge & confidence</u>	
<u>Stress management</u>	
<u>Relationship-building</u>	
<u>Presence & availability</u>	
Anti-Oppression	TBD (Criteria to be developed this year)

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PEER EVALUATION FORM

Reflecting **on your colleague's work** for the last year (responsibilities, roles, learning goals, job satisfaction, etc.), please respond to the following questions. This enables COCo's team to better support you in your position. Feel free to respond in either full sentences or in point form. **Give specific examples when possible.** See [the annex below](#) for job performance area descriptions. Please fill out this form for each of your colleagues, using the general criteria and their specific areas of responsibility.

1)

- a) **Qualities:** What do you appreciate about this person? What qualities do they bring to COCo?
- b) **Satisfaction & Growth:** In the last year, what were new learnings and/or skills that they developed?
- c) **Performance:** Can you comment on your colleague's performance for the last year? What are strength areas? What areas could be improved?
- d) **Relationship:** How is your working relationship going with this colleague? What do you appreciate or would want to improve?

1) QUALITIES: WHAT DO YOU APPRECIATE ABOUT THIS PERSON? WHAT QUALITIES DO THEY BRING TO COCO?

2) SATISFACTION AND GROWTH: IN THE LAST YEAR, WHAT WERE NEW LEARNINGS AND/OR SKILLS THAT THEY DEVELOPED?

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3) PERFORMANCE: CAN YOU COMMENT ON YOUR COLLEAGUE'S PERFORMANCE FOR THE LAST YEAR? WHAT ARE STRENGTH AREAS? WHAT AREAS COULD BE IMPROVED?

- *Include here links to each colleagues job description and areas of responsibility*

4) HOW IS YOUR WORKING RELATIONSHIP GOING WITH THIS COLLEAGUE? WHAT DO YOU APPRECIATE OR WOULD WANT TO IMPROVE?

5) OTHER COMMENTS AND/OR FEEDBACK

6) IN THE FOLLOWING TABLE, PLEASE COMMENT ON YOUR COLLEAGUE’S PERFORMANCE OVER THE PAST YEAR, REGARDING THE FOLLOWING [ATTRIBUTES AND RESPONSIBILITIES](#). CLICK THE TITLE OF EACH TO SEE THE DESCRIPTIONS IN THE ANNEX.

ATTRIBUTE OR RESPONSIBILITY	COMMENTS
<u>Collective management</u>	
<u>Leadership, initiative, creativity & vision</u>	
<u>Communications</u>	
<u>Organization, problem-solving & decision making</u>	
<u>Competence, self-knowledge & confidence</u>	
<u>Stress management</u>	
<u>Relationship-building</u>	
<u>Presence & availability</u>	
Anti-Oppression	TBD (Criteria to be developed this year)

FORMAL EVALUATION ANNEX

2017 PERFORMANCE AREAS AT COCO

Click the links below to jump down to performance area description.

13) [Commun-IT Development Coordination & Facilitation](#)

14) [Internal IT Coordinator](#)

15) [Communications Coordination](#)

16) [Contract Coordination](#)

17) [Governance & Membership Engagement Coordination](#)

18) [Atelier /c Coordination](#)

19) [Finance Coordination](#)

20) [Funding & Strategic Alliance Development](#)

21) [HR Coordination](#)

22) [Internal Project Support](#)

23) [Facilitation](#)

24) [Active Engagement in the Collaborative Structure of the Organization](#)

PERFORMANCE AREA DESCRIPTIONS

In the public version of this document, we have not included all of our job descriptions! They would normally be included here, except for our shared performance area:

ACTIVE ENGAGEMENT IN THE COLLABORATIVE STRUCTURE OF THE ORGANIZATION

Staff Member(s): all

- a) Reflect on the organization as a whole
- b) Communicate to members, community members and groups about the organization's goals and mission
- c) Active engagement in staff meetings, AGM learning & reflection sessions and retreats.
- d) Contribution and support to punctual special events and projects
- e) Active engagement in the organization's accountability processes and procedures

ATTRIBUTE AND RESPONSIBILITY DESCRIPTIONS

Here are suggested descriptions of different attributes and responsibilities. This is not a checklist of qualities to evaluate, but rather food for thought to stimulate your reflection on your (or your colleague's) performance and contributions to the institution. This work is based on a process previously developed by Inter Pares.

1) COLLECTIVE MANAGEMENT

- a) contributing to committees and management processes;
- b) being an active contributor to discussions;

- c) coming prepared to meetings;
- d) being responsive to requests for support, and asking for support as needed;
- e) contributing to adherence to professional standards;
- f) giving constructive, direct and honest feedback as requested or as needed;
- g) supporting others' endeavours to grow;
- h) monitoring the institution's well-being and pro-actively addressing issues as they are observed/emerging;
- i) being attentive to others' workload, and helping to create an environment of care;
- j) engaging as needed in conflict resolution problems between staff members, between staff and others;
- k) providing responsible financial management;
- l) acting as a catalyst to build team spirit.

2) LEADERSHIP, INITIATIVE, CREATIVITY & VISION

- a) championing our values and vision with enthusiasm, energy and honesty;
- b) self-starting;
- c) actively participating in direction-setting for one's program and/or the institution;
- d) monitoring developments in the internal and external environment, sharing strategic information with people in a timely manner;
- e) sharing information;
- f) keeping up to date on relevant priorities and issues
- g) actively seeking new trends in one's area of responsibility
- h) promoting and implementing joint efforts amongst allies and other organizations working on similar issues;
- i) adjusting practices and attitudes in changing environment
- j) adapting to new people, priorities, ideas and procedures as needed
- k) actively seeking new and creative ways to supplement limited financial resources and resolve operational problems;
- l) supports others to be innovative and creative.

3) COMMUNICATIONS

- a) openly sharing information;
- b) communicating one's point of view clearly and in an appropriate manner;
- c) listening generously to the issues and opinions of others before reacting and responding;
- d) being mindful of the space one occupies in meetings and institutional conversations;
- e) being attentive to building quality consensus as needed;
- f) informing colleagues of changes/information that will affect them;
- g) pro-actively and constructively resolves conflict with other staff, members and others.

4) ORGANIZATION, PROBLEM-SOLVING & DECISION-MAKING

- a) being able to plan, meet deadlines, set priorities, stay on schedule, manage own time;
- b) being attentive to detail;
- c) anticipating/ recognizing problems and issues as they arise;
- d) using critical analysis skills, implementing decisions and following up.

5) COMPETENCE, SELF-KNOWLEDGE & CONFIDENCE

- a) demonstrating a positive attitude and enthusiasm towards work and colleagues as well as professionalism, competence, responsibility and accountability in the job;
- b) identifying and pursuing areas where skill-building or more experience is needed;
- c) knowing when to ask for support;
- d) being open and receptive to constructive feedback from others on how one is perceived to behave/perform on the job.

6) STRESS MANAGEMENT

- a) working effectively and efficiently under pressure;
- b) finding constructive ways of reducing tension in a healthy manner;
- c) asking for emotional support when needed;
- d) remaining positive, professional, and enthusiastic about one's work.

7) RELATIONSHIP-BUILDING

- a) keeping up to date on issues affecting allies and civil society organizations in general, and in one's area of expertise in particular;
- b) promoting and ably representing COCo externally;
- c) developing and nurturing a network of contacts;
- d) knowing and calling upon people to assist in providing resources and/or support when required.

8) PRESENCE & AVAILABILITY

- a) being regularly present in the office and reasonably accessible
- b) being regularly present in relevant meetings
- c) being punctual for meetings
- d) taking responsibility for communicating with colleagues about working from home or other absences from the office