Évaluations de la performance

Surveillance de la santé organisationnelle

Partie 1

1

Mentions légales et conditions d'utilisation

Objectifs

À la fin de cette session, les participants seront en mesure de :

1. Connaître l'importance des évaluations systématiques de performance dans la quête de l'excellence.
2. Comprendre ce qu'il faut évaluer et comment.
3. Accéder à divers modèles d'enquêtes d'évaluation modifiables.
4. Comprendre comment utiliser les résultats des évaluations et des enquêtes d'appréciation pour planifier le progrès organisationnel.

L'évaluation et l'amélioration de l'efficacité et des performances opérationnelles sont essentielles pour les organisations afin de réduire leurs coûts, d'améliorer leur productivité et d'offrir une meilleure valeur ajoutée à leurs clients.

L'efficacité, la qualité et les performances opérationnelles sont un processus continu.

J'y
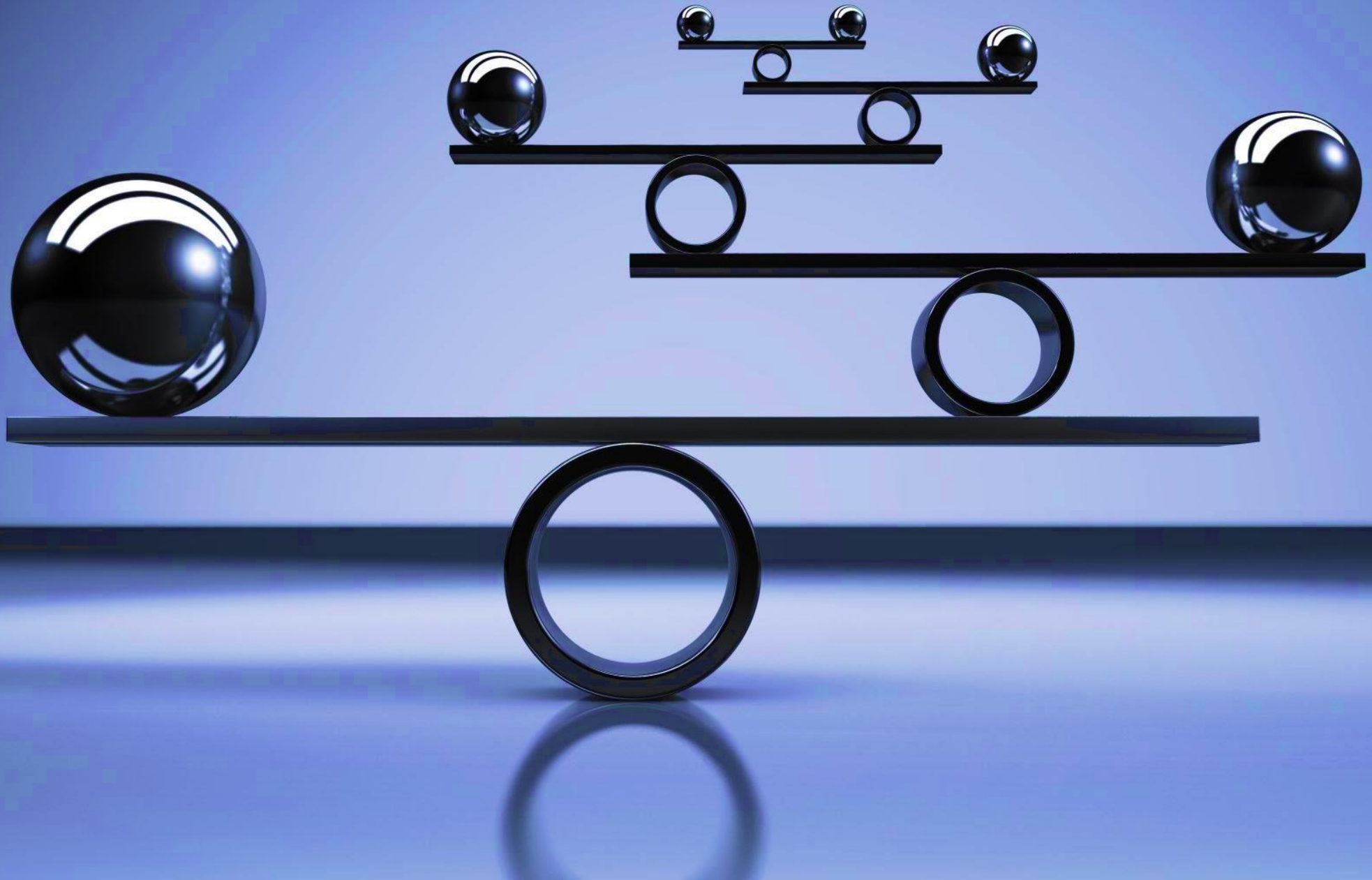
«La perfection n'est pas atteignable, mais si nous visons la perfection, nous pouvons atteindre l'excellence»

Vince Lombardi

Les évaluations efficaces impliquent :

1. Se concentrer sur l'amélioration et agir en ce sens.
2. Conclusions fondées sur les données.
3. Implication des parties prenantes.
4. Utilisation d'outils et de mesures standardisés.
5. Capacité de réflexion critique et analytique.

Valeur des modèles d'évaluation des performances

1. Assure la cohérence des informations dans le temps.
2. Facilite le suivi des progrès.
3. Encourage la réflexion et la communication structurées.
4. Améliore l'efficacité des fonctions des Ressources Humaines (RH).

Avantages et inconvénients de l'évaluation

- Méthode structurée de rétroaction sur les performances
- Aide à définir les priorités de développement professionnel
- Encourage, mobilise et développe le vivier de talents
- Crée une documentation des performances au fil du temps
- Peut améliorer les performances et la motivation au travail
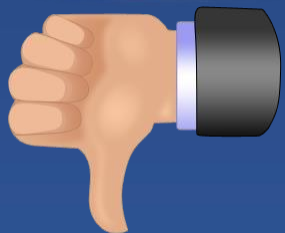
- Consommation du temps
- Potentiel de biais de récence
- Peut engendrer résistance, stress et insécurité
- Manque de normes uniformes
- Réticence à partager les incidents critiques

Portée de cette présentation

1. Gouvernance (performance du conseil d'administration)
2. Évaluation du fiduciaire
3. Évaluation des réunions du conseil d'administration
4. Évaluation des dirigeants
5. Évaluation de la direction
6. Évaluation du personnel professionnel
7. Enquête sur l'engagement des employés
8. Enquête sur la satisfaction des clients
9. Évaluation des programmes et des opérations
10. Accomplissement de la mission

Session de novembre 2025

Portée de l'évaluation/de l'appréciation

1. Governance (Board performance)
2. Board meeting evaluation
3. Director/trustee evaluation
4. Executive evaluation
5. Management evaluation
6. Professional staff evaluation
7. Employee engagement survey
8. Client satisfaction survey
9. Program and operational assessment
10. Mission fulfillment

November session

Qu'est-ce que la gouvernance ?

La gouvernance est un processus continu qui crée :
- ✓ le système par lequel une organisation est contrôlée
- ✓ les politiques selon lesquelles elle opère
- ✓ les mécanismes par lesquels elle et son personnel sont évalués et tenus responsables.

Les décisions de gouvernance doivent être éthiques, conformes à la loi et/ou aux réglementations, protéger les actifs (par exemple, la gestion des risques) et soutenir la mission de l'organisation.

Gouvernance du conseil d'administration - auto-évaluation

"L'objectif d'un processus d'auto-évaluation est de donner au conseil d'administration l'occasion de réfléchir à la manière dont il s'acquitte de ses responsabilités et d'identifier les pistes d'amélioration continue."

—Éléments de gouvernance : l'auto-évaluation du conseil d'administration, une responsabilité essentielle, The Governance Institute

Gouvernance du conseil d'administration - auto-évaluation

Evaluations par les membres du conseil d'administration de la manière don't le conseil s'acquitte de ses responsabilités de gouvernance :

- Composition du conseil d'administration (taille, compétences, représentativité)
- Fréquence des réunions
- Engagement des membres du conseil
- Prise de décision axée sur la mission
- Processus de planification stratégique
- Évaluation du leadership et planification de la relève
- Soutien financier, supervision et gestion des risques
- Suivi des opérations, des tendances et du développement institutionnels

Indicateurs prêts pour l'avenir:

- Conscience des changements à venir, susceptibles de présenter des menaces ou des opportunités.
- Analyse des implications stratégiques de ces changements.
- Adaptation proactive pour prospérer dans l'environnement futur.

Governing Boards Self-Assessment Questionnaire
Name of institution _____
Date: _____

Circle the most appropriate response using the following scoring definitions:
N = No knowledge/not applicable, 1 = Poor, 2 = Fair, 3 = Good, 4 = Very Good, 5 = Distinctive

Core Governance Responsibilities and Indicators	Practices typical of "Distinctive" rating	Trustee/Advisor Evaluation
1. Shaping mission and strategic direction	Board members have a common understanding of the organization's mission and vision. Mission and vision are used in policy and strategy decisions. The denominational identity and spiritual mission of the organization are kept in high profile, and the success of the organization is evaluated against these.	N 1 2 3 4 5
2. Strategic planning and policy decisions.	Board has established a process for strategic planning, and the board has quality engagement in the process.	N 1 2 3 4 5
3. Select, evaluate and develop executive leadership.	The Board has a leadership succession plan. The Board follows a regular executive evaluation system. The Board follows systematic search processes to fill vacancies in top leadership positions.	N 1 2 3 4 5
4. Ensure adequate financial resources.	The Board knows the long-range financial needs of the institution. Board members individually support the institution.	N 1 2 3 4 5
5. Provide expertise, access and influence to support organizational objectives.	Board membership has broad range of expertise and is thus capable of addressing most needs. Board members proactively engaged and effective in achieving access and influence goals.	N 1 2 3 4 5
6. Protect and enhance reputation of the organization.	Board members are effective ambassadors, proactive in building awareness and goodwill for organization.	N 1 2 3 4 5
7. Oversee financial performance and ensure risk management.	Board is active in preparing/reviewing multi-year financial plan. Board monitors financial statements regularly; ensures timely, independent audit of financial results and internal controls; understands compliance issues with various regulatory bodies. Organization maintains compliance and receives maximum period of accreditation.	N 1 2 3 4 5
8. Monitor performance and ensure accountability.	Board routinely monitors and evaluates performance, using the results to inform the strategic plan, resource allocation, and evaluation of officers. Where possible the performance is compared to comparable institutions.	N 1 2 3 4 5
9. Improve board performance.	Board evaluates its performance regularly (annually) and uses the information to develop plans to improve board effectiveness. Current board size is appropriate for governance. Formal process for identifying/recruiting directors. Board committees function effectively. Healthy atmosphere for effective discussion and efficient use of time. Directors feel involved and that their contributions are needed and valued. Annual calendar of board meetings known well in advance. Quality background materials sent in advance. Directors arrive well prepared for meetings. Minutes are circulated in a timely manner.	N 1 2 3 4 5

Comments about any aspect of governance or board performance are welcome.

_____
_____
_____

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Trustee Evaluation of Board Performance

This survey asks your opinion regarding the Board's performance on 10 core governance responsibilities plus one question about your personal experience as a trustee. Select the response of your choice by checking the appropriate check box. Comments may be added in the comment box provided following each question.

Core Governance Responsibilities

1. Evaluate Board performance in shaping mission and strategic direction. Factors to consider include: the extent to which Board members have a common understanding of the organization's mission and vision; the extent to which mission and vision are used in policy and strategy decisions; and the extent to which the denominational identity and spiritual mission of the organization are kept in high profile and the success of the organization is evaluated against these.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
❑	❑	❑	❑	❑	❑

2. Evaluate the Board's performance in establishing a process for strategic planning and for having quality engagement of board members in that process.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
❑	❑	❑	❑	❑	❑

3. Evaluate the Board's performance regarding leadership succession planning. Factors to consider include: having a regular executive evaluation system; using systematic search processes to fill vacancies in top leadership positions; identifying and mentoring individuals with potential leadership talent for the organization.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
❑	❑	❑	❑	❑	❑

4. Evaluate Board performance in knowing the long-range financial needs of the institution and in individually supporting the institution.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
❑	❑	❑	❑	❑	❑

5. Evaluate Board performance with respect to Board composition. Factors to consider include: an appropriate range of expertise, diversity, and constituency representation; effective engagement of trustees in support of organizational objectives.

Don't know	Very inadequate	Inadequate	Adequate	Good	Not applicable
❑	❑	❑	❑	❑	❑

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Évaluations/Portée de l'évaluation :

1. Governance (Board performance)
2. Board meeting evaluation
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November session

Réunion du conseil d'administration - auto-évaluation

- À l'ère de la responsabilisation, il faut faire preuve d'amélioration continue
- Intérêt d'une conduite annuelle : les problèmes sont traités facilement
- Devrait identifier :
    Domaines d'excellence
    Domaines à approfondir
    Principaux axes d'amélioration
    Plan d'action de suivi élaboré
    Fixation des objectifs pour l'année à venir
    Détermination des responsabilités et des échéances
    Suivi des progrès

Réunion du conseil d'administration - auto-évaluation

- L'excellence en gouvernance n'est pas automatique ! Elle exige une formation, une évaluation et un perfectionnement continus.
- L'auto-évaluation périodique (recommandée annuellement, mais au moins une fois tous les deux ans) du Conseil sert de retour d'information interne sur sa performance.

Réunion du conseil d'administration - auto-évaluation

- Durée des réunions suffisante
- Comités du conseil efficaces
- Accès rapide à l'information
- Leadership efficace des réunions du conseil
- Culture du conseil (possibilité de discuter en toute sécurité)
- Gestion des conflits d'intérêts et confidentialité
- Adéquation et ponctualité des procès-verbaux
- Formation des administrateurs
- Expérience personnelle en tant qu'administrateur

Board Meeting Assessment Tool

Name of institution: _____

Date: _____

Indicate with a checkmark (✔) your evaluation of this Board meeting using a scale of 1 through 5 where 1 = "unsatisfactory" and 5 = "excellent".

1. Physical arrangements: Seating and room space accommodations are comfortable; table space for documents/materials review; lighting and sound systems adequate; no ambient noise; room temperature appropriate; access to restrooms, etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

2. Agenda and materials: Agenda and appropriate materials received in advance; draft minutes for approval; access to archived documents; reports concise and informative; agenda reflects governance focus; ready access to governance document, etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

3. Role of Chairperson: Effective meeting management; engagement of all members; maintains meeting decorum; conflicts of interest managed; agenda management optimized; facilitates, not dominates, good group discussion and decision-making; etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

4. Boardroom culture: Safe to talk; absence of groupthink; respectful dialog; room for thoughtful dissent; conflicts of interest managed; adequate information for decision-making; regard for rules of order; respect for majority vote as 'group decision'; efficient use of time; etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

5. Governance expertise and focus: The Board understands and respects the boundary between governance and management; the full range of governance responsibilities is addressed; Board expertise is appropriate for the institution; etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

6. My role in the Board meeting: My presence makes a difference; my contributions to discussion are valued; I feel my time is well-spent; I am excited about the mission and future of this institution; I willingly invest time and energy for the institution between Board meetings; etc.

   My assessment: __ 1   __ 2   __ 3   __ 4   __ 5

   Observations: _____

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} November session

Auto-évaluation du directeur/administrateur

L'objectif est de recueillir les commentaires des administrateurs sur leur expérience au sein du conseil. Les sujets d'enquête porteront notamment sur :

- Adéquation avec la mission de l'organisation
- Compréhension des activités et des opérations de l'organisation
- Appropriation de l'administrateur au sein du conseil
- Capacité de l'administrateur à y consacrer suffisamment de temps et d'attention
- Engagement de l'administrateur, et pas seulement présence aux réunions
- Satisfaction de l'administrateur à siéger au conseil

Director/Trustee Self-Evaluation Checklist

The following self-evaluation checklist will assist the Board in understanding and working to improve director/trustee experience. Please assign a numerical score reflecting your thoughts on each of the statements below.

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree and NA=Not Applicable.

1. I have a reasonably clear sense of my obligations as a director/trustee. _____
2. I am familiar with this organization's history and what makes it distinctive. _____
3. I have a good understanding of the bylaws, purposes, policies, and programs of this organization as they relate to my role as a director/trustee. _____
4. I have a good understanding of the board's responsibilities. _____
5. I understand the distinction between the governance role of the board and the roles of management and staff. _____
6. I understand the organizational structure and the interrelationship of entities comprising this organization. _____
7. I understand the organization's strategic plan and objectives for the near future. _____
8. I understand the organization's budget and financial statements. _____
9. I have the time and interest to fulfill director/trustee obligations. _____
10. I attend board and committee meetings regularly. _____
11. I am well prepared for meetings (i.e. have reviewed and considered agenda material which is sent in advance of board/committee meetings). _____
12. I sense that I make meaningful contributions to the board's discussion and decision-making. _____
13. I express my reservations or disagreements in a constructive manner as board decisions are being made. _____
14. My committee assignments are within my area of expertise and interest. _____
15. I consistently respect and support board decisions made with due diligence. _____
16. I respect and maintain in confidence, matters of a confidential nature. _____
17. I represent the board and organization positively to its constituencies. _____
18. I contribute time, talent, and resources consistent with the expectations for members of this board and my personal capacity. _____
19. I find membership on this board to be stimulating and fulfilling. _____
20. I work hard at developing and maintaining a spirit of collegiality and positive interpersonal relationships within the board. _____

I have the following suggestions for improving the performance of this board and my capacity to contribute effectively.

_____
__
_____
__
_____
__

_____   _____   _____
Name of Director/Trustee   Signature   Date

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Évaluations/Portée de l'évaluation :

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November session

Le modèle « Les 5 E du leadership » met l'accent sur cinq actions clés pour un leadership efficace :

1. Envision (Imaginer, Rêver)
2. Engage (Engager)
3. Energize (Dynamiser)
4. Enable (Permettre)
5. Execute (Exécuter).

Évaluation du président/directeur général

Domaines de performance à prendre en compte :

- Leadership
- Concentration sur la mission de l'organisation
- Rôle dans les relations externes
- Interface avec le conseil d'administration
- Compétences en planification stratégique
- Développement institutionnel
- Communication performante
- Points forts et points à améliorer

Executive Evaluation Instrument

Name: _____ Position: _____ Date: _____

Instruction: *Please express your assessment of the candidate's performance of each statement by placing a score in the corresponding blank in column 2 (Score). Use numerical values (range 1 - 5) where 1 = unsatisfactory and 5 = excellent.*

	Score
1. **Leadership Performance**	
1.1. The President has a clear vision of the future of the institutions on campus.	___
1.2. The President communicates the vision effectively and motivates others in the various institutions to affect this vision.	___
1.3. Leadership of _____ and its core corporations is handled in an orderly manner and is not crisis oriented.	___
1.4. The President maintains an effective team spirit among the senior leadership personnel at _____.	___
1.5. The President delegates responsibilities appropriately and holds persons accountable for results.	___
2. **Focus on Mission**	
2.1. The President keeps _____ Board members mindful of and responsive to the value-differentiating themes of spiritual life and wholeness, diversity, and global outreach.	___
2.2. The President is effective in harmonizing the mission, vision and values of Core and Affiliated organizations.	___
2.3. Plans for future development of the institution are referenced to the organization's mission.	___
2.4. The President is effective in aligning institutional mission and values with the mission and values of the Seventh-day Adventist Church.	___
3. **Role in External Relationships**	
3.1. The President is well positioned and professionally involved in community (regional and national) activities pertinent to this organization.	___
3.2. The President is effective in creating and sustaining support and goodwill for _____ at regional and national levels.	___
3.3. The President is effective in representing and sustaining this organization's positive image in the minds of Seventh-day Adventist Church members.	___
4. **Interface with Board of Trustees**	
4.1. The President communicates effectively with board members regarding goals, expectations, and outcomes.	___
4.2. The President keeps board members adequately informed concerning major issues relating to _____ and its affiliated organizations.	___
4.3. The President is comfortable in asking opinions of the board that relate to management of _____.	___
4.4. As a trustee, I have confidence that the President is providing effective leadership towards a good future for _____ and its related organizations.	___

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Trustee Evaluation of the President

Mark the box beneath the term that best expresses your evaluation of each statement.

1. **Leadership Performance**

   1.1. The President has a clear vision of the future of the institutions on campus.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

   1.2. The President maintains an effective team spirit among the senior leadership personnel.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

2. **Focus on Mission**

   2.1. The President keeps Board members mindful of and responsive to the value-differentiating themes of the institution: spirituality, wholeness, diversity, service, excellence.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

   2.2. The President is effective in aligning institutional mission and values with the mission and values of the Seventh-day Adventist Church.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

3. **Role in External Relationships**

   3.1. The President is effective in creating and sustaining support and goodwill for the institution at regional and national levels.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

4. **Interface with the Board of Trustees**

   4.1. The President keeps board members adequately informed concerning major issues threats or opportunities for the institution's future.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

   4.2. I have confidence that the President is providing effective leadership towards a good future for the institution.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

5. **Strategic Planning**

   5.1. The President is effective in identifying and developing future leaders for the institution.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

6. **Institutional Advancement**

   6.1. The President is effective in generating philanthropic and governmental support for the institution.

Inadequate	Fair	Good	Very good	Excellent
❑	❑	❑	❑	❑

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Le modèle d'enquête d'évaluation du président-directeur général peut être quelque peu adapté aux autres dirigeants en tenant compte de leur rôle et de leur éventail de fonctions.

Évaluations/Portée de l'évaluation :

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6. Professional staff evaluation
7. Employee engagement survey
8. Client satisfaction survey
9. Program and operational assessment ⎤
10. Mission fulfillment ⎦ November session

Évaluation de la performance de gestion :

Composantes clés :
- Performance dans l'atteinte des objectifs
- Capacités de leadership
- Compétences managériales (communication, prise de décision, développement d'équipe, gestion des ressources)
- Contribution aux objectifs et à la mission de l'organisation

L'objectif est de reconnaître les points forts et les axes de croissance, de favoriser le développement professionnel et de garantir l'adéquation des performances aux objectifs de l'entreprise.

Évaluation des performances du gestionnaire :

- Démonstration des valeurs fondamentales de l'organisation.
- Capacité à assumer les responsabilités attendues.
- Capacité à atteindre les objectifs individuels et ceux de l'entreprise.
- Efforts pour atteindre les points à améliorer depuis la dernière évaluation.
- Capacité à déléguer des tâches si nécessaire.
- Capacité à faire preuve de professionnalisme et de leadership.
- Capacité à collaborer avec les autres gestionnaires, employés et superviseurs.
- Capacité à faire preuve de proactivité et à résoudre les problèmes potentiels avant qu'ils ne surviennent.

Managerial Leadership Survey

Manager name: _____   Manager position: _____

Date of survey: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. The manager consistently demonstrates this organization's core values.	1__ 2__ 3__ 4__ 5__ NA__
2. The manager exhibits abilities appropriate for the responsibilities of his/her assignment.	1__ 2__ 3__ 4__ 5__ NA__
3. The manager has shown the capacity to set personal and departmental goals and is results-driven.	1__ 2__ 3__ 4__ 5__ NA__
4. The manager is proficient in delegating tasks and exercising appropriate oversight of others.	1__ 2__ 3__ 4__ 5__ NA__
5. The manager collaborates with employees, supervisors, and other managers.	1__ 2__ 3__ 4__ 5__ NA__
6. The manager shows proactivity in identifying and addressing potential problems thus averting a crisis.	1__ 2__ 3__ 4__ 5__ NA__
7. The manager exemplifies professionalism in conduct and communication.	1__ 2__ 3__ 4__ 5__ NA__
8. The manager is committed to improvement in the work environment.	1__ 2__ 3__ 4__ 5__ NA__
9. The manager encourages ideas and feedback from employees regarding the performance of their tasks.	1__ 2__ 3__ 4__ 5__ NA__
10. The manager assesses opportunities/obligations for change and adapts appropriately.	1__ 2__ 3__ 4__ 5__ NA__
11. The manager treats employees fairly and maintains a safe work environment.	1__ 2__ 3__ 4__ 5__ NA__
12. The manager offers timely support and guidance to team members.	1__ 2__ 3__ 4__ 5__ NA__
13. The manager facilitates learning opportunities for employees and serves as a mentor.	1__ 2__ 3__ 4__ 5__ NA__
14. The manager remains calm and reliable during moments of crisis.	1__ 2__ 3__ 4__ 5__ NA__
15. The manager practices active listening and understands another person's emotions and experiences.	1__ 2__ 3__ 4__ 5__ NA__

How might the manager's performance become more effective? _____

_____

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Évaluation des performances du gestionnaire :

Les évaluations de performance peuvent être effectuées de deux manières ou d'une combinaison des deux manières :

      1. Utilisation d'un questionnaire rempli par le superviseur du manager, les autres managers en contact avec le manager et les personnes supervisées par ce dernier. Ce système est décrit comme une évaluation à 360 degrés.

      2. Utilisation d'un dialogue structuré entre le manager et le superviseur du manager.

Évaluation de performance par entretien/interview :

1. Basé sur le dialogue plutôt que sur des évaluations numériques.
2. Peut être utilisé en combinaison avec une approche par sondage.
3. Plus axé sur l'avenir que sur les performances passées.
4. Peut être plus difficile à quantifier.
5. Idéal pour l'évaluation des fonctions managériales, mais adaptable à la plupart des autres situations.
6. Peut manquer de contribution/retour d'information de la part des personnes supervisées par le manager.
7. Un cadre individuel élimine les réponses erronées.

Exemples de questions - entretien d'évaluation:

1. De quelles réalisations de ce trimestre êtes-vous le plus fier ?
2. Quels objectifs avez-vous atteints ? Quels objectifs n'avez-vous pas atteints ?
3. Qu'est-ce qui vous motive à accomplir votre travail ?
4. Que puis-je faire pour rendre votre travail plus agréable ?
5. Quelles sont vos conditions de travail idéales pour être le plus productif possible ?
6. Quelles responsabilités/tâches appréciez-vous le plus ?

Manager Appraisal Interview
Sample questions
(Ref: https://www.quantumworkplace.com/future-of-work/employee-performance-review-questions)

1. What accomplishments this quarter are you most proud of?
2. Which goals did you meet? Which goals fell short?
3. What motivates you to get your job done?
4. What can I do to make your job more enjoyable?
5. What are your ideal working conditions to be the most productive?
6. What personal strengths help you do your job effectively?
7. What makes you the best fit for your position?
8. What skills do you have that you believe we could use more effectively?
9. What kind of work comes easiest to you?
10. What goals/deliverables were you least proud of? Why? How will you do those differently in the future?
11. What 2-3 things will you focus on in the next quarter to help you grow and develop?
12. What can I do to help you better meet your goals?
13. Which job responsibilities/tasks do you enjoy most? Which do you least enjoy?
14. How do you think your role helps the company succeed?
15. What do you like least about your current role? What would you change?
16. What do you like most about working for this company?
17. Which emerging technologies do you think could catapult our systems to the next level?
18. What aspect of the company's vision excites you the most, and how can we tailor your objectives to tap into that enthusiasm?
19. How do you engage with your employees to obtain feedback on procedures, proficiency, and quality?
20. In what ways are you mentoring people in your staff?

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Évaluations/Portée de l'évaluation :

1. Governance (Board performance)
2. Board meeting evaluation
3. Director/trustee self-evaluation
4. Executive evaluation
5. Management evaluation
6. **Professional staff evaluation**
7. Employee engagement survey
8. Client satisfaction survey
9. Program and operational assessment
10. Mission fulfillment

November session

Évaluation du personnel professionnel :

Les organismes professionnels disposent peut-être déjà d'un système/instrument d'évaluation interne.

Les modèles d'évaluation suivants (pour les médecins et les infirmières) se concentrent sur les opinions/perceptions, et pas nécessairement sur les faits, et ne doivent donc pas être confondus avec des évaluations par les pairs.

Medical Staff Performance Appraisal Survey

Name of individual being reviewed: _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. Communicates effectively with other healthcare professionals.	1__ 2__ 3__ 4__ 5__ NA__
2. Collaborates with physician/nurse colleagues.	1__ 2__ 3__ 4__ 5__ NA__
3. Accepts feedback provided.	1__ 2__ 3__ 4__ 5__ NA__
4. Recognizes his/her limitations.	1__ 2__ 3__ 4__ 5__ NA__
5. Participates effectively as a member of the healthcare team.	1__ 2__ 3__ 4__ 5__ NA__
6. Exhibits professional behavior towards colleagues.	1__ 2__ 3__ 4__ 5__ NA__
7. Performs technical procedures skillfully.	1__ 2__ 3__ 4__ 5__ NA__
8. Selects diagnostic tests appropriately.	1__ 2__ 3__ 4__ 5__ NA__
9. Critically assesses diagnostic information.	1__ 2__ 3__ 4__ 5__ NA__
10. Selects appropriate treatment.	1__ 2__ 3__ 4__ 5__ NA__
11. Accepts responsibility for own professional actions.	1__ 2__ 3__ 4__ 5__ NA__
12. Handles transfer of care appropriately.	1__ 2__ 3__ 4__ 5__ NA__
13. Maintains confidentiality of patients and their families.	1__ 2__ 3__ 4__ 5__ NA__
14. Coordinates care effectively with other professionals.	1__ 2__ 3__ 4__ 5__ NA__
15. Maintains quality medical records.	1__ 2__ 3__ 4__ 5__ NA__
16. Contributes to quality improvement programs and practice guidelines.	1__ 2__ 3__ 4__ 5__ NA__
17. Handles emergency situations effectively.	1__ 2__ 3__ 4__ 5__ NA__
18. Manages own stress effectively.	1__ 2__ 3__ 4__ 5__ NA__
19. Handles requests for consultation in a timely manner.	1__ 2__ 3__ 4__ 5__ NA__
20. Communicates effectively with patients and their families.	1__ 2__ 3__ 4__ 5__ NA__

I have received the results of this review.   _____   _____

                                       Signature   Date

Comments: _____

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Registered Nurse Performance Appraisal Survey

Name of individual being reviewed: _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree and NA=Not Applicable.

Factors and Items	Rating
1. Provides a safe environment specific to patient age and development.	1__ 2__ 3__ 4__ 5__ NA__
2. Assures quality through application of policy, procedure and standards of care.	1__ 2__ 3__ 4__ 5__ NA__
3. Acts as a clinical resource for peers.	1__ 2__ 3__ 4__ 5__ NA__
4. Initial and continued patient assessments are consistently complete.	1__ 2__ 3__ 4__ 5__ NA__
5. Provides safe and culturally sensitive care.	1__ 2__ 3__ 4__ 5__ NA__
6. Exhibits professional behavior towards colleagues.	1__ 2__ 3__ 4__ 5__ NA__
7. Manages unit equipment and supplies responsibly.	1__ 2__ 3__ 4__ 5__ NA__
8. Demonstrates commitment to customer satisfaction and patient advocacy.	1__ 2__ 3__ 4__ 5__ NA__
9. Maintains ethical standards in respecting patient privacy and confidentiality.	1__ 2__ 3__ 4__ 5__ NA__
10. Takes initiative to improve work processes.	1__ 2__ 3__ 4__ 5__ NA__
11. Makes positive contribution to teamwork/collaboration.	1__ 2__ 3__ 4__ 5__ NA__
12. Supports team and leaders in change implementation.	1__ 2__ 3__ 4__ 5__ NA__
13. Responds to patients with empathy, compassion, and quality care.	1__ 2__ 3__ 4__ 5__ NA__
14. Communicates effectively and respectfully.	1__ 2__ 3__ 4__ 5__ NA__
15. Demonstrates good judgment in decision making.	1__ 2__ 3__ 4__ 5__ NA__
16. Demonstrates high personal work standards.	1__ 2__ 3__ 4__ 5__ NA__
17. Demonstrates alignment with institutional mission.	1__ 2__ 3__ 4__ 5__ NA__
18. Manages own stress effectively.	1__ 2__ 3__ 4__ 5__ NA__
19. Maintains clinical competence in patient care.	1__ 2__ 3__ 4__ 5__ NA__
20. Committed to continuous professional growth.	1__ 2__ 3__ 4__ 5__ NA__

I have received the results of this review. _____ _____

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**Évaluations/Portée de l'évaluation :**

1. Governance (Board performance)
2. Board meeting evaluation
3. Director/trustee self-evaluation
4. Executive evaluation
5. Management evaluation
6. Professional staff evaluation
7. **Employee engagement survey**
8. Client satisfaction survey
9. Program and operational assessment ⎫
10. Mission fulfillment ⎭ November session

Enquête sur l'engagement des employés

L'« engagement » des employés est qualitativement différent de la « satisfaction » des employés.

- La satisfaction peut découler du lieu, de la rémunération, des horaires adaptés, de l'environnement de travail, etc. « Dans ce travail, j'utilise mon esprit et mon corps. »
- L'engagement désigne l'investissement personnel de l'employé dans la nature et la finalité de son travail. « Dans ce travail, j'utilise mon cœur, mon esprit et mon corps. »

Satisfaction des employés comparée à leur engagement :
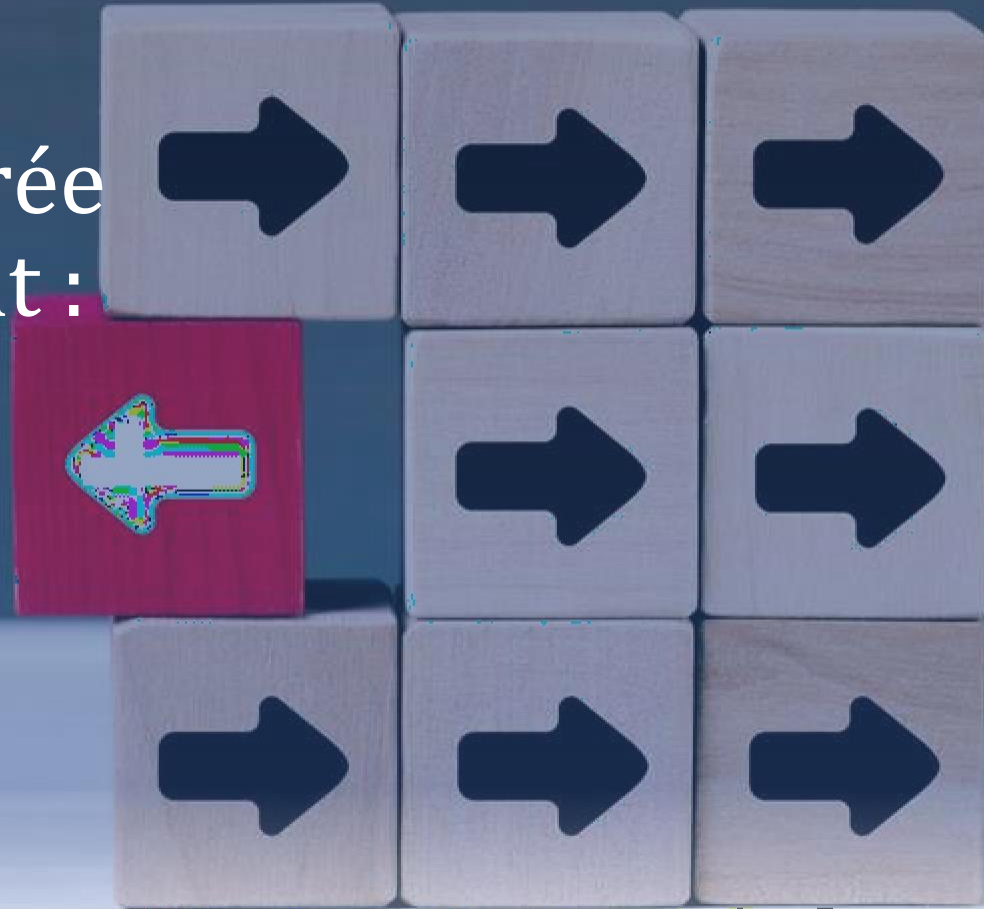
"Je considère comme une conception erronée et dangereuse de l'hygiène mentale que de supposer que l'homme a avant tout besoin d'équilibre ou, comme on l'appelle en biologie, d'« homéostasie », c'est-à-dire d'un état d'absence de tension, mais plutôt de lutter pour un objectif valable, une tâche librement choisie.
Ce dont il a besoin, ce n'est pas de se libérer de ses tensions à tout prix, mais de l'appel d'un sens potentiel qui attend d'être comblé par lui."

—Victor Frankl, *Search for Meaning*, p. 105

Fournir un travail sain:

1. Sens de l'objectif : plus que la simple production de biens ou de services, un objectif qui fait la différence.

2. Sentiment d'appartenance : avoir son mot à dire sur la façon dont le travail est réalisé.

3. Sentiment d'appartenance : ce que je fais s'inscrit dans une mission plus large.

4. Sentiment de communauté : nous faisons cela ensemble.

5. Sentiment de contact : nous pouvons construire des relations enrichissantes.

L'esprit n'est pas toujours au même endroit que le corps
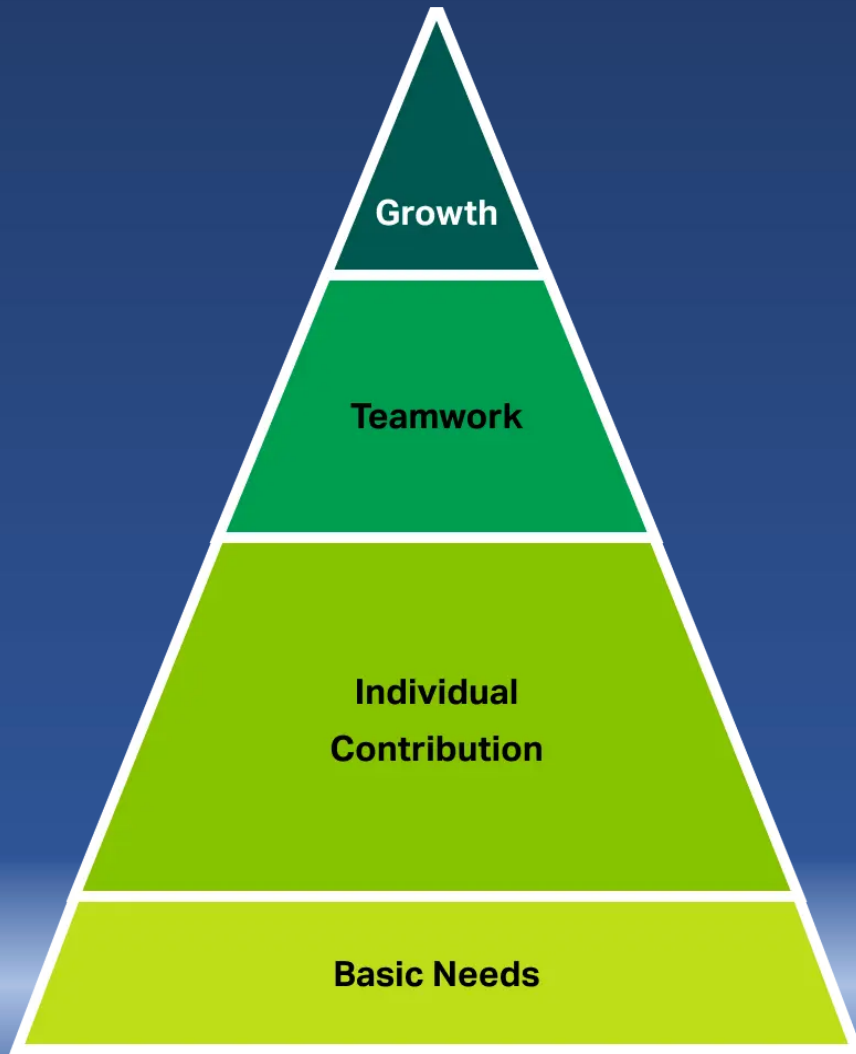
L'enquête Gallup Q12 évalue quatre niveaux de besoins des employés, de la clarté fondamentale à l'épanouissement personnel. Répondre à ces besoins de manière séquentielle crée un environnement de travail où les individus et les équipes peuvent s'épanouir.
https://www.gallup.com/q12-employee-engagement-survey/

Employee Engagement Survey
(Items 1-12 based on Gallup Q[12] Survey)

Name of survey respondent   :   _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. I am satisfied with this company as a place to work.	1__ 2__ 3__ 4__ 5__ NA__
2. I know what is expected of me at work.	1__ 2__ 3__ 4__ 5__ NA__
3. I have the materials and equipment I need to do my work right.	1__ 2__ 3__ 4__ 5__ NA__
4. At work, I have opportunity to do what I do best every day.	1__ 2__ 3__ 4__ 5__ NA__
5. In the last seven days, I have received recognition or praise for doing good work.	1__ 2__ 3__ 4__ 5__ NA__
6. My supervisor, or someone at work, seems to care about me as a person.	1__ 2__ 3__ 4__ 5__ NA__
7. At work, my opinions seem to count.	1__ 2__ 3__ 4__ 5__ NA__
8. The mission or purpose of my company makes me feel my job is important.	1__ 2__ 3__ 4__ 5__ NA__
9. My associates or fellow employees are committed to doing quality work.	1__ 2__ 3__ 4__ 5__ NA__
10. I have a best friend at work.	1__ 2__ 3__ 4__ 5__ NA__
11. In the last six months, someone at work has talked to me about my progress.	1__ 2__ 3__ 4__ 5__ NA__
12. This last year, I have had opportunities at work to learn and grow.	1__ 2__ 3__ 4__ 5__ NA__

Describe some of the biggest challenges you face here: _____

_____

_____

What suggestions do you have for improving the workplace? _____

_____

_____

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Engagement des employés : le modèle **MAGIC**

- Meaning (Signification)
- Autonomy (Autonomie)
- Growth (Croissance)
- Impact (Impact)
- Connection(Connexion)

- **Meaning**—mon travail a un but au-delà de l'activité elle-même
- **Autonomy**—pouvoir façonner votre travail et votre environnement de manière à vous permettre de donner le meilleur de vous-même
- **Growth**—être étiré et mis au défi de manière à favoriser la croissance personnelle et professionnelle
- **Impact**—voir des résultats positifs, efficaces et utiles de votre travail
- **Connection**—le sentiment d'appartenir à quelque chose au-delà de soi-même

Employee Engagement Survey

Name of survey respondent   :   _____

Role and/or position description: _____

Date of review: _____

Place a checkmark after the number that best represents your assessment for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. I am proud to work for this organization.	1__ 2__ 3__ 4__ 5__ NA__
2. I would recommend this organization to others as a great place to work.	1__ 2__ 3__ 4__ 5__ NA__
3. I rarely think about looking for a job elsewhere.	1__ 2__ 3__ 4__ 5__ NA__
4. Leaders/managers keep people informed about what is happening.	1__ 2__ 3__ 4__ 5__ NA__
5. Leaders communicate a vision that motivates me.	1__ 2__ 3__ 4__ 5__ NA__
6. I have access to things I need to do my job well.	1__ 2__ 3__ 4__ 5__ NA__
7. I have access to learning and development that I need to do my job well.	1__ 2__ 3__ 4__ 5__ NA__
8. I receive appropriate recognition when I do good work.	1__ 2__ 3__ 4__ 5__ NA__
9. Management shows a genuine interest in my career growth and aspirations.	1__ 2__ 3__ 4__ 5__ NA__
10. My work is meaningful and contributes to company success.	1__ 2__ 3__ 4__ 5__ NA__
11. My role here enables a good work-life balance.	1__ 2__ 3__ 4__ 5__ NA__
12. I feel that I am part of a supportive team.	1__ 2__ 3__ 4__ 5__ NA__
13. My job engages my skills and talents effectively.	1__ 2__ 3__ 4__ 5__ NA__
14. This organization has a great culture of ethics, inclusion, fairness, equality	1__ 2__ 3__ 4__ 5__ NA__
15. I align with the organization's mission and values.	1__ 2__ 3__ 4__ 5__ NA__
16. My work environment inspires me to do my best.	1__ 2__ 3__ 4__ 5__ NA__
17. The organization is committed to quality and excellence.	1__ 2__ 3__ 4__ 5__ NA__

Describe some of the biggest challenges you face here: _____

_____

_____

What suggestions do you have for improving the workplace? _____

_____

_____

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Que peut-on faire :

1. Créer et maintenir une culture d'entreprise saine
2. Mettre en avant la mission, la vision et les valeurs
3. Assurer un travail enrichissant
4. Reconnaître et apprécier les bonnes performances
5. Examiner les politiques du point de vue des employé

Évaluations/Portée de l'évaluation :

1.
2. Board meeting evaluation
3. Director/trustee self-evaluation
4. Executive evaluation
5. Management evaluation
6. Professional staff evaluation
7. Employee engagement survey

8. Client satisfaction survey
9. Program and operational assessment
10. Mission fulfillment

November session

Satisfaction des clients

1. Découvrez comment les clients évaluent leur expérience au sein de votre établissement.
2. Améliorez la qualité des soins et la communication.
3. Évaluez/actualisez les procédures qui renforcent la réputation de la marque et la fidélité des clients.
4. Explorez les fonctions essentielles (les « 4 C ») des soins primaires : premier contact, exhaustivité, coordination, continuité.
5. La réactivité aux questionnaires peut réduire la durée des séjours, accélérer la convalescence, limiter les complications et diminuer le stress lié aux problèmes médicaux.

Patient Experience Survey

Name of survey respondent   :   _____

Date of discharge: _____

Participation in this survey is voluntary.

Please tell us about your most recent stay at (NAME OF HOSPITAL) ending on the date of discharge shown above. Place a checkmark after the number that best represents your experience for each of the following factors where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree, and NA=Not Applicable.

Factors and Items	Rating
1. The nurses treated me with courtesy and respect.	1__ 2__ 3__ 4__ 5__ NA__
2. The nurses listened carefully to me.	1__ 2__ 3__ 4__ 5__ NA__
3. The nurses explained things to me in a way I could understand.	1__ 2__ 3__ 4__ 5__ NA__
4. The doctors treated me with courtesy and respect.	1__ 2__ 3__ 4__ 5__ NA__
5. The doctors listened carefully to me.	1__ 2__ 3__ 4__ 5__ NA__
6. The doctors explained things to me in a way I could understand.	1__ 2__ 3__ 4__ 5__ NA__
7. During my stay my room and bathroom were kept clean.	1__ 2__ 3__ 4__ 5__ NA__
8. During my stay I was able to get the rest I needed.	1__ 2__ 3__ 4__ 5__ NA__
9. During my stay the area around my room was kept quiet at night.	1__ 2__ 3__ 4__ 5__ NA__
10. When I needed help, the help came as soon as I needed.	1__ 2__ 3__ 4__ 5__ NA__
11. When given medication I was always informed what the medicine was for and what side effects were possible.	1__ 2__ 3__ 4__ 5__ NA__
12. Doctors/nurses discussed with me/my caregiver the plan for my care after leaving the hospital.	1__ 2__ 3__ 4__ 5__ NA__
13. Doctors/nurses informed me/my caregiver about symptoms/health issues possible after leaving hospital.	1__ 2__ 3__ 4__ 5__ NA__
14. I appreciated the chaplaincy services of this hospital.	1__ 2__ 3__ 4__ 5__ NA__
15. I was informed about the costs for my healthcare and how/when payments were due.	1__ 2__ 3__ 4__ 5__ NA__
16. I would recommend this hospital to my family/friends.	1__ 2__ 3__ 4__ 5__ NA__

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En résumé

Les évaluations de performance doivent être considérées comme faisant partie d'une approche plus globale de la productivité des employés.

Maîtrisées correctement, les évaluations peuvent produire des résultats positifs tant pour les employés que pour l'organisation.

Une gestion défaillante ou incorrecte d'un système d'évaluation de la performance peut avoir de graves conséquences sur le moral et les relations des employés.

Préparer le terrain :

1. Descriptions de poste claires.
2. Intégration complète des employés.
3. Processus de clôture : les performances sont évaluées en fonction des objectifs et des attentes définis au préalable.

Système d'évaluation des performances :
- Définir les attentes en matière de performance. ...
- Suivre les performances en continu. ...
- Recueillir les commentaires et les données. ...
- Évaluer les performances par rapport aux attentes. ...
- Organiser la réunion d'évaluation. ...
- Documenter les résultats. ...
- Assurer le suivi et planifier le développement.

Comment mener des enquêtes d'évaluation :

1. Distribuer/collecter/compiler les copies de papier. (Pratique pour l'évaluation des réunions du conseil d'administration.)

2. Déterminer si les réponses doivent être anonymes.

3. (L'auto-évaluation des membres du conseil d'administration doit être signée.)

4. Sélectionnez l'administrateur tiers pour le processus d'évaluation.

5. Créer une plateforme électronique de diffusion, de collecte et de compilation des résultats de l'enquête (par exemple, Survey Monkey).

6. Partagez d'informations avec les parties concernées.

7. Suivi rapide des résultats de l'enquête en indiquant les points à améliorer.

Évaluations fortuites et informelles :

Une posture d'ouverture aux améliorations :

1. Fournir un mécanisme permettant aux employés de formuler des observations et des suggestions d'amélioration (par exemple, une boîte à suggestions et recommandations).
2. Suivre régulièrement les recommandations.
3. Évaluer et communiquer sur les recommandations.
4. Reconnaître et valoriser les actions contribuant à l'excellence.

Ressources

1. 5-keys-of-employee-engagement-magic
2. NLC-Sample-Nonprofit-CEO-Evaluation-Form_June2022.pdf
3. https://nrchealth.com
4. https://www.boardeffect.com
5. https://Stanford Law School Board-self-assessment-questionnaire.pdf
6. https://www.globalhealthlearning.org/sites/default/files/page-files/Chapter-Governance-Self-Assessment.pdf
7. https://surveymonkey.com
8. https://www.sjomagnet.org/documents/Organizational_Overview/OO10.13-Peer-Reveiw-Clinical-Nurse-1-4.pdf
9. https://www.gallup.com/q12-employee-engagement-survey/
10. https://www.cultureamp.com/blog/employee-engagement-survey-questions
11. https://www.hcahpsonline.org/globalassets/hcahps/survey-instruments/web/effective-january-1-2025-discharges-and-forward/2025_final_survey-instruments_english_web_updated.pdf
12. https://www.ahrq.gov/cahps/surveys-guidance/cg/index.html
13. https://www.quantumworkplace.com/future-of-work/employee-performance-review-questions

L'excellence est le résultat progressif d'une volonté constante de s'améliorer.
Pat Riley