**Performance Development Plan (PDP) – FY 2012**

**Employees Name: Managers Name: Directors Name:**

**Position Title: *(titles from career framework)*  Unit:**

**Review Date: Review Period:**

**Type of Review: ⃝ Interim Probationary ⃝ Probationary ⃝ Annual ⃝ Update**

**Performance Development Plan Guidelines**

* Highlight accomplishments
* Evaluate performance against WHAT – specific goals, skills, abilities, knowledge
* Evaluate Performance against HOW – core and role based competencies
* Set goals and outcomes for coming year
* Identify areas for training, career development and coaching

**Instructions to Employee**

* Complete Section I – Review your past performance against goals & competencies. Rate yourself using the Performance Rating definitions below (1-4). Include examples of how you displayed each competency.
* For ratings of “needs improvement”, please identify the specifics of the improvement needed in Section III, Development
* Forward completed self-assessment to your manager.

**Instructions to Manager**

* Complete Section I – Review employee’s past performance against goals & competencies by selecting rating defined below
* For ratings of “needs improvement”, please identify improvement needed in Section III, Development
* Complete Section II - Provide employee with unit goals and identify individual goals/outcomes for the next review period
* Once you have met with the employee to discuss, both you and the employee need to sign off

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| --- |
| **Performance Rating Definitions** |
| 4 – Exceeds expectations | Significantly and consistently exceeds virtually all expectations of the role Recognized by others within and outside the work group for excelling in their work |
| 3 – Meets expectations | Consistently meets, and occasionally exceeds, expectations of the role, team and individual objectives.. Performance is well balanced, dependable & competent. |
| 2 – Improvement required or new in position | Meets some expectations and objectives, of the role. Development and/or training required to consistently meets expectations of this role. |
| 1 – Does not meet expectations | Employee’s performance requires improvement to meet the expectation of the role given education, work background and skill set. |

**SECTION 1 – Past Review Period Review - Goals and Competencies**

* Identify and review goals and competency expectations that were set in previous review period (PDP)
* Specifically discuss (a) achievements (b) performance against goals and competencies (c) areas for improvement

**Goals/Outcomes**

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Goal/Outcome** | **Employee Rating** | **Manager Rating** |
| **1** |  | **(1-4 dropdown ratings)** | **(1-4 dropdown ratings)** |
| **2** |  |  |  |
| **3** |  |  |  |
| **4** |  |  |  |

**Competencies**

* In addition to ratings, please provide examples of how each competency was displayed while performing day to day work activities **(different set of competencies/proficiency expectations based on position in career ladder noted above in position title – below is a sample)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Core Competency** | **Proficiency Expectations** | **Employee Rating** | **Manager Rating** |
| **Communication** | Advanced: Converses with, writes reports for, and creates/delivers presentations to all levels of colleagues and peer groups in ways that support problem solving and planning. Seeks a consensus with business partners. Debates opinions, tests understanding, and clarifies judgments. Brings conflict into the open empathetically. Explains the context of multiple interrelated situations, asks searching, probing questions, and solicits expert advice prior to taking action and making recommendations. | **(1-4 dropdown ratings)** | **(1-4 dropdown ratings)** |
| Example |  |
| Comments |  |
| **Collaboration** | Advanced: Consistently fosters collaboration and respect among team members by addressing elements of the group process that impedes, or could impede, the group from reaching its goal. Engages the “right people,” within and beyond organizational boundaries, by matching individual capabilities and skills to the team’s goals. Works with a wide range of teams and readily shares lessons learned and credit for team accomplishments. |  |  |
| Example |  |
| Comments |  |
| **Problem Solving** | Advanced: Diagnoses problems using formal problem-solving tools and techniques from multiple angles and probes underlying issues to generate multiple potential solutions. Proactively anticipates and prevents problems. Devises, facilitates buy-in, makes recommendations, and guides implementation of corrective and/or preventive actions for complex issues that cross organizational boundaries and are unclear in nature. Identifies potential consequences and risk levels. Seeks support and buy-in for problem definition, methods of resolution, and accountability. |  |  |
| Example |  |
| Comments |  |
| **Role-Based Competency** | **Proficiency Expectations** | **Employee Rating** | **Manager Rating** |
| **Accountability** | Advanced: Sets enhanced objectives for self and others. Monitors performance trends and identifies opportunities to improve standards. Provides regular feedback and suggests alternative approaches necessary to ensure that organizational objectives and superior standards are achieved. Delegates responsibility and reallocates resources as needed to ensure that priorities are met. |  |  |
| Example |  |
| Comments |  |
| **Business Process Knowledge** | Advanced: Describes and documents critical cross-functional business process flows. Applies business process reengineering techniques and methods in analyzing process flow and accountability charts. Recommends and advocates substantive process enhancements and assesses both internal and external implications. |  |  |
| Example |  |
| Comments |  |
| **Information Systems Knowledge** | Advanced: Identifies means of integrating technical support requirements with enterprise processes and strategies. Identifies technological opportunities to meet client needs. Creates information system solutions to meet the needs of business partners. Partners with appropriate technical consultants, experts, and managers. |  |  |
| Example |  |
| Comments |  |

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| --- | --- | --- |
| **Overall Rating on Performance:**  | **(auto-calculate based on total of employee ratings from goals/competency section above)** | **(auto-calculated based on total of manager ratings from goals/competency section above)** |

**Employee Comments on Performance: (open field)**

**Manager Comments on Performance: (open field)**

**SECTION II – Future Review Period - Goals/Outcomes**

* Review the unit goals developed by manager in consultation with their Director
* Align individual goals/outcomes with unit goals (may be done in advance or in conjunction with employee). Describe how individual goals assist with achieving unit & UBC IT goals
* Illustrate how competencies will be used to help achieve outcomes/goals
* Review goals/outcomes throughout year in 1:1’s to ensure they continue to be relevant and attainable

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Individual Outcomes/Goals** | **Required Actions to Meet Outcomes/Goals** | **Measures of Success** | **Resources & Support Required** |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |
| **4** |  |  |  |  |

**SECTION III – Individual Development Plan**

**Development Opportunities in Current Role**

* Consider areas for improvement, new or enhanced skills required for job to meet expectations and/or goals

|  |  |  |
| --- | --- | --- |
| **Skill/Competency to be Developed** | **Method** **(courses, mentoring, self-directed)** | **Target Completion Date** |
|  |  |  |
|  |  |  |
|  |  |  |

**NOTE:** This section is optional for employee’s who are considering other opportunities as part of their career path

**Development Opportunities in Support of Career Goal**

**Career Ladder Goal/Objective: (optional)**

|  |  |  |
| --- | --- | --- |
| **Skill/Competency to be Developed** | **Method** **(courses, mentoring, self-directed)** | **Support requested of manager (on the job opportunities, introductions etc.)** |
|  |  |  |
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**Employee Comments:**

* **I have met with my manager to discuss the content of this PDP and agree with the ratings. I also understand and agree with performance goals (Section II) and my Individual Performance Development Plan (Section III) for the coming year. I have indicated any support I may require in order to meet my goals. (or)**
* **I would like the opportunity to meet with HR regarding this PDP (note: HR will work with the employee and Manager to seek resolution and agreement)**

 **(open field)**

**Manager Comments:**

* **I have met with the employee and reviewed the content of this PDP, illustrating how the employee’s contributions help UBC IT achieve its vision and how competencies are displayed in the employee’s day to day work activities. I will work with the employee to support them to be successful in meeting their goals.**

**(open field)**

**Employee signature: Date:**

**Manager signature: Date:**