



Performance Management and Planning

Employee Name: _____

Position/Title: _____

Date Assumed Position: _____

Feedback period: _____ to _____

This performance review conducted by:

Section A – Employee Input (To be completed by Employee)

Complete this page prior to meeting with your Manager. It will give your Manager a better understanding of how you view your job and accomplishments. It will also help prepare your Manager to discuss with you any thoughts, concerns, issues, or recommendations that you feel are important to your job or personal growth. Attach additional pages if required.

Responsibilities: Describe your primary duties and responsibilities during this assessment period:

Major Accomplishments: List your major accomplishments during this period. Include any items that your Manager should consider in evaluating performance.

Internal/External Customers: Provide the names of your Internal and External customers from which your Manager may obtain Third-Party Input.

Objectives/Career Planning: Identify any objectives or goals upon which you would like to focus in the coming year. Objectives should be specific, measurable, achievable, reasonable and timely. Include development goals as well (e.g. career aspirations, long term work goals, etc.). During this assessment, you will mutually agree, with your Manager, upon your key objectives and discuss career planning.



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Section B.1 – Key Performance Measures Self Assessment		
Both Employee and Employer to complete these sections.		
Key Performance Measures	Specific Examples Recommended Action(s) Explanations for Self-Assessment Rating	Your Self- Assessment Rating (1-10)
Team Measures 1. 2. 3.		
Individual Measures 1. 2. 3.		
Section B.2 – Competency Self Assessment		
Both Employee and Employer to complete these sections.		
Key Competencies	Specific Examples Recommended Action(s) Explanations for Self-Assessment Rating	Your Self- Assessment Rating (1-10)
Productivity/Teamwork – uses tools and techniques to increase productivity. Promotes collaborative decisions when appropriate.		
Knowledge/Technical Contribution – employee’s mastery and skill in application of the technical responsibilities of the job.		
Leadership/Teamwork – ability to communicate objectives, delegate and motivate effectively, promotes teamwork, build and maintain morale.		
Overall Comments:		

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Section C – Your Key Objectives (To be completed by Employee)

During your Performance Assessment Review Meeting, we will agree to a plan of action for key objectives during the coming year. However, you should outline your key objectives and developmental needs as they relate to organization’s key performance measures.

Objective	Action Plan	Key Measures	Deliverable Date	Priority

Section D – Training Plan (To be completed by Employee)

Based on your responsibilities, indicate your desired training plan for the coming year. Consider work objectives and developmental needs as they relate to organizational requirements and whether the training is “essential”, “necessary” or “desired”. Finally, indicate in which quarter the training will be taken.

Skill/Ability	E/N/D	Suggested Training Activity	Q 1/2/3/4

Employee and Employer Comments:

Section E – Signatures