|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **Purpose** | **Date** |
| **Name** |  | Start of year planning |  |
| **Position** |  | Mid-year check-in |  |
| **Manager** |  | Year-end review |  |

|  |
| --- |
| **PERFORMANCE MANAGEMENT CHECKLIST** |
| **Start of Year Planning**  |
| [ ]  | Review team goals, discussing how they link to the business plan. |
| [ ]  | Review the position job description ensuring responsibilities and accountabilities are understood. |
| [ ]  | Review the competencies ensuring responsibilities and accountabilities are understood.  |
| [ ]  | Set and record performance goals.  |
| [ ]  | Set and record development plans.  |
|  |  |
| Mid-Year Check-in  |
| [ ]  | Monitor performance and ensure on-track. |
| [ ]  | Seek/provide feedback on performance. |
| [ ]  | Adjust goals, if required, to respond to organizational/role changes. |
|  |  |
| Year End Review  |
| [ ]  | Prepare for the review - provide examples of performance |
| [ ]  | Review achievement of performance goals. |
| [ ]  | Review achievement of development plans. |
| [ ]  | Review achievement of competencies. |
| [ ]  | Complete the Performance Summary. |
| [ ]  | Sign and submit the form. |

**RATING SCALE**

**Exceeds Expectations**

*What was done* – Excels against performance requirements and consistently exceeds the expectations set.

*How it was done* – Consistently carries out his/her work in ways that model company competencies. Contributions position the individual as a role model.

**Meets Expectations**

*What was done* – Meets the performance requirements and consistently achieves the expectations set.

*How it was done* – Demonstrates the company’s competencies in daily work. Contributions position the individual as a solid contributor.

**Does Not Meet Expectations**

*What was done* – Does not consistently meet performance requirements or the expectations set.

*How it was done* –Does not demonstrate behaviours or attitudes consistent with the company's competencies. Demonstrates limited interest in learning or developing.

**SECTION 1:** **PERFORMANCE GOALS**

Based on team goals, key responsibilities for the role and competencies, set two performance goals. Goals may have different end-points, for example, a goal might be undertaken in the first half of the year, another in the second half, or each may require a full year to complete. Progress toward your goals to ensure they are on track will be recorded and achievement summarized in this form. When summarizing, consider the actions taken, whether the goal was achieved, and the impact on the organization.

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| --- | --- | --- | --- |
| Goal 1 | Key Actions | Measures of Success |  Timeline |
|  |  |  |  |

|  |  |
| --- | --- |
| Goal 1 ReviewManager Rating | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeded Expectations **[ ]**  Met Expectations **[ ]**  Did Not Meet Expectations |

|  |  |  |  |
| --- | --- | --- | --- |
| Goal 2 | Key Actions | Measures of Success |  Timeline |
|  |  |  |  |

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| --- | --- |
| Goal 2 Review | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeded Expectations **[ ]**  Met Expectations **[ ]**  Did Not Meet Expectations |

**SECTION 2:** **DEVELOPMENT PLAN**

Development goals are intended to support professional development and growth. When creating this development plan with your manager, consider development activities you can undertake in your current role to support your career growth. Achievement of your development plan will be reflected in performance goal and/or competency ratings and is not formally measured. When commenting on your development plan, consider the actions taken, the results, and the impact on your performance.

|  |  |  |
| --- | --- | --- |
| Development Goals | Measures of Success | Timeline |
| 1. |  |  |
| 2. |  |  |
| Mid-year check-in | Development plan on track? [ ]  Yes [ ]  No Progress (if required): |
| Year-end review | Employee comments: |
| Manager comments: |

**SECTION 3: COMPETENCIES**

For each competency, provide a summary of accomplishments that demonstrate your proficiency, describe challenges you overcame, and opportunities for improvement

**1. JOB KNOWLEDGE AND QUALITY OF WORK** - Performs the role according to requirements and expectations established by company and takes steps to uphold performance standards.

* Demonstrates the knowledge, skills, and abilities to perform in the role
* Produces work to the company’s expectations
* Uses systems/procedures to organize and keep track of information (e.g., "to-do" lists, calendar reminders, filing systems, etc.) and ensure timely, high quality work
* Double-checks accuracy of information and/or work.
* Open to feedback to improve performance of the role
* Adds to knowledge, skills, and abilities by learning from experiences and even mistakes
* Takes accountability for ongoing professional development to maintain knowledge, skills, and abilities to perform in the role
* Uses resources efficiently and effectively

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| --- | --- |
| Mid-year check-in | Performance on track? [ ]  Yes [ ]  No Comments: |
| Year-endManager Rating | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeds Expectations **[ ]**  Meets Expectations **[ ]**  Does Not Meet Expectations  |

**2. RESULTS ORIENTED** - Focuses efforts on achieving and improving quality results consistent with individual, team and company’s goals and long-term vision.

* Identifies what needs to be done and takes action before being asked or required
* Anticipates possible challenges and develops contingency plans in advance
* Not stopped by the unexpected; identifies and evaluates options to determine the best course of action
* Investigates and recommends new approaches or ways to do things; challenges the status quo to raise the bar
* Demonstrates good judgement in weighing implications of varying options when making decisions, and recognizes when escalation is necessary
* Recognizes own capacity and identifies when there is too much to get done; re-prioritizes to balance competing demands so results are not compromised
* Perseveres until work is completed as per expectations; is accountable for results

|  |  |
| --- | --- |
| Mid-year check-in | Performance on track? [ ]  Yes [ ]  No Comments: |
| Year-endManager Rating | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeds Expectations **[ ]**  Meets Expectations **[ ]**  Does Not Meet Expectations  |

**3. CUSTOMER FOCUS** – Identifies and responds to current and future customer needs and wants, providing excellent service to both internal and external customers.

* Listens to internal/external customers and demonstrates an understanding of what customers really need and want
* Anticipates and addresses the requirements and expectations of internal/external customers
* Effectively resolves internal/external customer concerns and problems in a prompt and timely manner
* Knows when and how to politely decline inappropriate or excessive internal/external customer requests
* Appropriately communicates customer issues with other team members/managers, and escalates situations or requests as needed
* Measures customer satisfaction throughout the year

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| --- | --- |
| Mid-year check-in | Performance on track? [ ]  Yes [ ]  No Comments: |
| Year-endManager Rating | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeds Expectations **[ ]**  Meets Expectations **[ ]**  Does Not Meet Expectations  |

**4. WORKING WITH OTHERS** – Communicates effectively, and develops, maintains and strengthens working relationships with both internal and external customers, furthering common goals.

* Interacts with others in ways that are straightforward, respectful, and inclusive; uses diplomacy and tact in all dealings
* Is consistent in behaviour, respects the opinions of others and exhibits a professional demeanour
* Delivers information in a well-organized and engaging manner so that it is understood
* Communicates with a sense of common purpose to avoid "we versus them" attitudes
* Listens attentively to people's ideas and concerns; checks understanding to ensure everyone is "on the same page"
* Provides assistance to others when they need it and time allows
* Keeps the team involved and/or informed about own role/projects as appropriate
* Effectively identifies and manages potential conflicts within relationships to prevent disagreements from arising
* Helps contribute to building positive team morale by showing commitment to team goals and expressing confidence in others' abilities to work together and be successful; expresses appreciation for the contribution of others

|  |  |
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| Mid-year check-in | Performance on track? [ ]  Yes [ ]  No Comments: |
| Year-endManager Rating | Employee comments: |
| Manager comments: |
| **[ ]**  Exceeds Expectations **[ ]**  Meets Expectations **[ ]**  Does Not Meet Expectations  |

**SECTION 5: YEAR-END REVIEW PERFORMANCE SUMMARY**

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| --- |
| **OVERALL PERFORMANCE RATING:** The average of manager ratings on the form. |
| **[ ]**  Exceeds Expectations **[ ]**  Meets Expectations **[ ]**  Does Not Meet Expectations |
| Employee comments: |
| Manager comments: |
| Date completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Employee signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Manager signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |