## ubcblue_full

The University provides a fulfilling environment in which to work, learn, and live, reflecting our values and encouraging the open exchange of ideas and opinions.

*(Commitment to Outstanding Work Environment,*

Place and Promise: The UBC Plan.)

## confidential

# PERFORMANCE PLAN AND REVIEW

Statement of Purpose

UBC’s Performance Plan and Review is an on-going process for management staff that provides:

* a method to link individual and organizational goals and assist individual growth and development
* sustained dialogue on work performance
* a record of job performance
* recognition of faculty member/employee performance

#### Personal Information

|  |  |
| --- | --- |
| Faculty member/ Employee Name: |   |
| Position: |  Department: |
| Supervisor: |   |
| Review Period: | From: To: |

|  |  |
| --- | --- |
| PERFORMANCE PLAN AND REVIEW | Initial Interview Worksheet |

**Questions**:

1. What do you enjoy most about your work? What keeps you here?
2. What do you think your strengths/assets are? (skills, knowledge, talent)
3. What about your weaknesses?
4. What do you want more of?
5. What do you think prevents you or gets in your way?
6. What are your goals for your current role? (seek specific outcome measures and timelines)
7. How often would you like to meet to discuss your progress? Will you let me know what you are feeling or will I need to ask?
8. Do you have any personal goals or commitments that you can tell me about?
9. What is the best praise/recognition you’ve ever received? What made it the best?
10. Have you had any really productive partnerships or mentors? Why do you think these relationships worked so well for you?
11. What are your future growth and/or career goals? Are there any specific skills you want to learn? Any specific challenges you want to face? How can I help?
12. Is there anything else you think might help us work well together?

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| PERFORMANCE PLANNING | 1st Planning Meeting**Quarter #**  Date:  |

**Ask the faculty member/employee to track his/her own performance during the intervening months.**

**Questions**:

Focus on up to 3 outcomes for the upcoming months.

1. What do you want to accomplish in the next 3-4 months? What is your main focus going to be?
2. What new discoveries (new insights/new developments) are you hoping to make?
3. What do you think is the most effective route to achieving these goals?
4. What new relationships are you hoping to build?
5. How will we measure your progress/ achievement?
6. How can I help you? What do you need from me?

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| PERFORMANCE PLAN AND REVIEW | Planning & Review Meeting**Quarter #** Date:  |

Ask the faculty member/ employee to track his/ her own performance during the interveningmonths.

**Questions**:

The first ten minutes review the previous quarter.

1. What actions have you taken?
2. What discoveries have you made? (new insights, new development)
3. What relationships have you built or strengthened?

Then the focus should shift to setting up to 3 outcomes for the upcoming months.

1. What do you want to accomplish in the next 3-4 months? What is your main focus going to be?
2. What new discoveries ? (new insights, new development) are you hoping to make?
3. What do you think is the most effective route to achieving these goals?
4. What new relationships are you hoping to build?
5. How will we measure your progress/achievement?
6. How can I help you? What do you need from me?

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| PERFORMANCE PLANNING | **Addendum Work Sheet**Date:  |

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| PERFORMANCE PLAN AND REVIEW | Faculty Member/Employee Tracking Sheet Outcome/FocusDate:  |

What actions have I taken?

What discoveries have I made? (new insights, new development What did I learn about these goals?)

What relationships have I built or strengthened?

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| ANNUAL PERFORMANCE REVIEW/EVALUATION | Date:  |

**1. Quality of Relationships**

* with clients/customers/peers
* with colleagues/employees
* with department head/manager

(consider respect for individual values, checking assumptions, ability to provide & receive feedback, willingness to collaborate, readiness to share ideas and involve others; capacity to build morale & contribute to

team spirit)

**2. Quality of Communication**

(Consider ability to convey information,

and willingness to create opportunities for others to share meaningful information)

3. Development & Growth

(Consider active participation in ongoing development; willingness to set stretch

goals and challenge own thinking & actions; participates in development of others)

4. Quality of Thinking and Innovation

(Consider ability to see beyond isolated events and identify patterns; ability to

reflect rather than react immediately; willingness to approach situations in new ways)

**5. Commitment to Vision**

(Consider actions consistent with pursuing

an overriding vision; ability to take risk and make controversial decisions to support vision)

**6. Ethical Leadership**

(Consider actions that role model values

and behaviors consistent with UBC vision; promotes honesty & integrity; meets commitments; acts with sense of accomplishment; actively engages others)

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| ACKNOWLEDGMENT OF REVIEW  |   |

Submit a copy of this page to the faculty/department administrator for filing

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| --- | --- |
| Faculty Member/ Employee Comments: |   |
| Department Head/ Manager’s Comments: |   |

**Faculty Member/ Employee:**

This Performance Evaluation has been prepared with my participation and

 I **agree** with this assessment

Signature and date

 I **disagree** with this assessment

Signature and date

**Department Head/Manager:**

Signature and date

The 2 following worksheets are optional and may be used if Department Head/School Director/Division Head/Manager and faculty member/employee see a positive use in exploring further the faculty member/employee’s potential in term of assets he/she can bring to the job, and in terms of career move, career growth or career development.

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| PERFORMANCE PLANNING | **Optional Natural Assets Discovery** **Work Sheet**Date:  |

**Questions**:

1. What part of your role have you been significantly good at?
2. What activities do you feel passionate about?
3. What activity do you do where time seems to disappear?
4. Which new activity have you learned that you were instantly able to perform smoothly and naturally, as if you had always done it?
5. What parts of your role did you learn quickly?
6. What activities have come to you naturally?
7. What activities give you greatest personal satisfaction?
8. What situations give you energy?
9. What do you find fulfilling?

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| PERFORMANCE PLANNING | **Optional Career Discovery** **Work Sheet**Date:  |

**Questions**:

1. How would you describe success in your current role? Here is what I think (add your own comments)
2. What do you actually do that makes you as good as you are? What does this tell you about your skills, knowledge, and talents? Here is what I think (add your own comments)
3. What part of your current role do you enjoy the most? Why?
4. Which part of your current role are you struggling with? What does this tell you about your skills, knowledge, and talents?
5. What can we do to manage around this? Training? Positioning? Support system? Mentoring?
6. What would be the perfect role for you? Imagine you are in that role. It’s three P.M. on a Thursday. What are you doing? Why would you like it so much? Here is what I think. (Add your own comments)