



## PERFORMANCE REVIEW AND PLAN

*Personal and Confidential*

In its vision document, *a Place and a Promise*, UBC commits to the value of 'creating an exceptional work environment.' To enact this value, the University provides a fulfilling environment in which to work, learn, and live; maintains our values of academic freedom, mutual respect, integrity, dignity, and inclusivity; and encourages the open exchange of ideas and opinions.

### The UBC 'Performance Review and Plan' is designed to:

- Facilitate communication, discussion, and exchange of ideas between employees and their managers.
- Promote a high level of employee performance through consistent and formal feedback from the supervisor.
- Create alignment between employee and organizational goals and to assist individual growth and development.
- Develop a motivated, engaged, and high performing workforce that supports the work of the University.
- Clearly articulate performance expectations to the employee.

#### EMPLOYEE INFORMATION

Employee Name:	
Employment Group:	
Department:	
Area/Division:	
Position Title:	
Position Level:	

#### EMPLOYMENT INFORMATION

	DD-MM-YY
Initial Employment Date at UBC:	
Initial Employment Date in Department:	
Start Date in Current Position:	
Date of Last Review:	
Date of This Review:	

## PART A - Performance Assessment

Provide the employee with feedback on the following competencies. Please review the definition of each competency, and provide detailed comments and specific supporting examples of how the employee demonstrates the competency and discuss together how they may further develop the competency.

The 'Comments/Examples' fields will expand as you type if additional space is required. If you prefer to print this document and complete it by hand, you can increase the size of the 'Comments/Examples' fields by clicking or tabbing inside the box and then pressing the 'ENTER' button on your keyboard until the field is the desired size.

<b>Approach To Work</b>	Consider the extent to which the employee demonstrates initiative, flexibility, adaptability, and resourcefulness while performing the duties of their position, and assess their ability to follow instructions. Consider the manner in which the employee accepts new and varied work assignments, and assumes responsibility for their completion.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>Job Knowledge/ Quality of Work</b>	Consider the extent to which the employee keeps current with, understands, and applies his/her knowledge of the techniques, methods, and skills involved in the position; Consider the extent to which the work is accurate, thorough, completed in a timely manner, and reflects follow-through to completion.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>Planning &amp; Organization / Time Management</b>	Consider the extent to which activities are planned, prioritized, and time organized to achieve goals and targets. Consider the amount of supervision required to achieve goals and targets. Consider the ability of the employee to adeptly manage competing tasks and to use his/her time efficiently and effectively.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>Judgement / Decision Making</b>	Consider the extent to which the employee demonstrates independent thinking and effective problem-solving skills. Consider the extent to which the employee makes appropriate decisions after adequately contemplating various available courses of action.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>Communication / Interpersonal Skills</b>	Consider the ability of the employee to express them self clearly and professionally both verbally and in writing, as well as their ability to exercise tact and diplomacy. Consider the effectiveness of the employee's interactions with co-workers, supervisors, faculty, staff, students, and customers. Consider their commitment and contributions to team success while working in a group. Consider how well the employee gets along with and respects the rights of colleagues and displays a cooperative spirit.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	

*Reviewer to list discussion notes from meeting with Employee here:*

<b>Personal Leadership</b>	Consider the contribution of the employee (in addition to their regular job duties) to their unit and the UBC campus community as a whole. Consider the degree to which they display a healthy work-life balance and take responsibility for their personal growth and professional development.
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*Comments/Examples (to be completed by Reviewer prior to meeting with Employee):*

*Reviewer to list discussion notes from meeting with Employee here:*

<b>Safety Awareness &amp; Demonstration</b>	Consider the work habits and attitude of the employee as they apply to working safely and the degree to which the employee complies with University safety rules; Consider the extent to which the employee understands and demonstrates proper safety practices, promotes safety and shows awareness of safety of others and accountability for personal safety.
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*Comments/Examples (to be completed by Reviewer prior to meeting with Employee):*

*Reviewer to list discussion notes from meeting with Employee here:*

## Performance Assessment Continued

Additional competencies for employees with supervisory responsibilities

The following competencies are from the leadership model used in the 'Managing at UBC' course. This model is based on the idea that the act of managing requires an understanding of both management and leadership with a focus on both tasks and people. For further information, please see <http://www.hr.ubc.ca/odl/leadership/managing/program/framework.html>.

<b>People Leadership</b>	Consider the ability of the manager to motivate others and to model the values of the unit. Consider their ability to build relationships, trust, and credibility with staff. Consider the degree to which the manager promotes cooperation, fairness, and equity in the unit. Consider the level of pride and enthusiasm demonstrated by the manager towards the unit and its goals.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>People Management</b>	Consider the level of interest, concern, consideration, and respect the manager has displayed for staff and their development. Consider the ability of the manager to promote cooperation and teamwork and to resolve conflict effectively. Consider their ability to delegate appropriately and to fully utilize their staff to accomplish unit goals. Consider the amount of recognition and acknowledgment given regarding staff achievement.
<i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i>	
<i>Reviewer to list discussion notes from meeting with Employee here:</i>	

<b>Task Management</b>	<p>Consider the degree to which the manager has established clear roles, responsibilities, priorities, and performance targets for staff. Consider their ability to monitor, assess, and review staff performance while providing opportunities for training and development as necessary. Consider the degree to which they have demonstrated accountability and sound judgement in managing UBC resources. Consider the level to which they strive for high quality performance and take initiative to seek improvements in outputs and efficiencies.</p>
<p><i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i></p>	
<p><i>Reviewer to list discussion notes from meeting with Employee here:</i></p>	

<b>Task Leadership</b>	<p>Consider the degree to which the manager welcomes new ideas and displays a creative and innovative approach to their work. Consider the ability of the manager to make clear, consistent, transparent, and timely decisions. Consider their ability to focus on the 'customers' of the unit. Consider the level of assertiveness and persistence they have displayed in the pursuit of the goals of the unit. Consider the ability of the manager to align the goals and priorities of the unit with those of the University, and to provide a sense of direction to the unit.</p>
<p><i>Comments/Examples (to be completed by Reviewer prior to meeting with Employee):</i></p>	
<p><i>Reviewer to list discussion notes from meeting with Employee here:</i></p>	

**PART B - Review of Work Goals and Learning Objectives Established at Previous Performance Development and Plan (if applicable)**

Please review the goals and objectives established at the previous Performance Development and Review (if applicable). Please also refer to the employee 'Self-Assessment and Goal Setting' document and discuss with employee. Please insert comments here regarding progress towards those goals and identify goals/objectives being carried forward if applicable (attach additional sheet if necessary).

Previous Goal / Objective	Comments Regarding Results

**PART C - Carry Forward and New Goals and Objectives**

Please refer to the Employee's 'Self-Assessment and Goal-Setting' document, and through dialogue with the employee mutually develop goals/objectives. Please complete the following table during your meeting with the employee. Progress towards these goals should be reviewed informally and the table should be updated as required throughout the upcoming review period. *(please list as many goals as you feel are appropriate)*

<b>Goal/Objective:</b>
Achievement Plan/Targeted Completion Date:
Check-In Dates:
Comments Regarding Progress:

<b>Goal/Objective:</b>
Achievement Plan/Targeted Completion Date:
Check-In Dates:
Comments Regarding Progress:

<b>Goal/Objective:</b>
Achievement Plan/Targeted Completion Date:
Check-In Dates:
Comments Regarding Progress:

**PART D - Reviewer Overall Comments**

Please complete the following section prior to your meeting with the employee. Provide the employee with an overall summary of their performance. Highlight the employee's major accomplishments and note the employee's strengths and development needs as they relate to performance. You may also comment on other areas of the employee's performance that have not been addressed in this document.

*To be completed by Reviewer prior to meeting with Employee:*



Reviewer to list discussion notes from meeting with Employee here:

### Acknowledgments – Signatures

Employee Name:	Signature:
<input type="checkbox"/> I would like to attach my 'Self-Assessment' to this document. <input type="checkbox"/> I will be providing my overall comments which I would like to be attached to this document.	* I have read and discussed this evaluation with my supervisor. My signature means that I have been advised on my performance and does not necessarily imply that I agree with the contents of this review.
Reviewer Name:	Signature:
Manager Name: (if different from Reviewer)	Signature:
Date of Next Review:	
<b>Distribution:</b> Original to be kept in the employee's file, and a copy of this document should be provided to the employee. Please remember to attach the employee's 'Self-Assessment' and overall comments to this document (if applicable).	