Instructions for Starting the FY21 Performance Management Form

We have two documents for the entire performance management process. 1) The FY21 Performance Management Form (click here for the link) and 2) The Self-Appraisal Form.

The Performance Management Form is intended to be a “living document” that you and your manager will revisit and update throughout the review period. Each employee is asked to work in collaboration with his or her manager to create individual performance and key competency goals as well as professional development goals. **It is important that you keep an electronic copy of this form for updating throughout the year and finalizing at the end of the review period.** Your manager will be required to submit a mid-year update to HR.

The Self-Appraisal Form will be completed by the employee at the end of FY21. There is no need to focus on this form until that time.

Preparing the Performance Management Form

Individual Performance and Key Competency Goals

- The first two columns on the form, Goals and Expected Results are to be completed jointly between staff member and manager.

- Working with your manager, the staff member should identify 3-4 key goals for the column labeled goal. Each goal must be written in SMART format (specific, measurable, achievable, realistic and time bound). Each goal should also have a corresponding expected result(s) – think about what will result if the goal is achieved. It is helpful to be clear on why you are setting each goal, and this will help to inform the expected results.

- Individual performance and key competency goals should:
  - Set expectations for FY21
  - Align with organizational and department goals
  - Challenge you to hone and/or develop skills and competencies
  - Drive actions to produce desired results

- When developing goals consider:
  - **Specific**: What will the goal accomplish? How and why will it be accomplished?
  - **Measurable**: How will you measure whether the goal has been achieved?
  - **Achievable**: Is this goal attainable – is it possible? Do you have the skills, resources, knowledge and support to accomplish the goal?
  - **Realistic/relevant**: Is the goal practical? Is it aligned with the needs? Is there a clear purpose?
  - **Time-bound**: When/what date will this goal be attained?
Professional Development Goals

- A professional development goal is an opportunity for the development, enhancement or improvement of a skill or competency. Consider both current strengths you would like to further develop, and skills or competencies you might wish to improve or change. A professional development goal may also include the attainment of knowledge in a new or related field.

- A good professional development plan may include one or more of the following:
  - Take on a new assignment- cover for a maternity leave, participate on a taskforce, volunteer for a committee
  - Stretch assignment- something out of your comfort zone
  - Lateral move- the only pathway is not just up, sometimes it makes sense to broaden your skills and consider a lateral move
  - Attend a training live or via the web, or go to a conference
  - Take a course
  - Seek a mentor
  - Join a professional association

The professional development plan is for you! No one will evaluate you on your progress against this plan, however it is expected that you and your manager will work in partnership so they can better support you on your career path and they can help to ensure you make progress against your goal(s).