



## Sample Performance Management Plan (PMP)

**Name:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Reports to:** \_\_\_\_\_

**Date (from):** \_\_\_\_\_ **Date (to):** \_\_\_\_\_

### GUIDE TO COMPLETING THE PERFORMANCE MANAGEMENT PLAN (PMP)

#### Section I:

The supervisor and the employee will set out four to six key performance objectives (KPOs) that will be evaluated during the annual PMP cycle. These KPOs should be limited to the employee's role in contributing to the organization's overall goals and objectives.

#### Section II:

Employee's key competencies will be assessed.

#### Section III:

If new objectives are assigned during the year, they should be discussed by the manager and the employee, and recorded.

#### Section IV:

Ideas for personal and/or professional development arising out of the ongoing discussions between the manager and employee should be captured here. Ideally, these plans should be followed up on the subsequent period.

#### Section V:

This section is provided for the employee to make any comments they wish.

#### Section VI:

This section is provided for both parties to sign, so they may both acknowledge that the discussion took place.



### **Performance Ratings and Definitions:**

Please refer to the following rating scale when completing the forms.

- EX: EXCEEDS EXPECTATIONS** – Performance exceeds all expectations. Accomplishments are clearly obvious. Individual regularly contributes beyond current job responsibilities, and serves as a role model to others. On new assignments, learning progress exceeds expectations.
- ME: MEETS EXPECTATIONS** – Solid reliable performance that substantially meets expectations. In some instances, expectations are exceeded; in others, they may occasionally fall short. For new responsibilities, learning progress meets expectations.
- PM: PARTIALLY MEETS EXPECTATIONS** – Performance does not meet expectations in certain areas. Improvement in these areas is required. Supervisory attention and direction is needed to help employee meet performance expectations/responsibilities. For new responsibilities, learning progress partially meets expectations.
- NI: NEEDS IMPROVEMENT** – Performance consistently falls below minimum expectations associated with the job. Performance requires immediate improvement. An action plan is needed to address shortcomings, which may include training, coaching or other support.



## SECTION I: PLANNED PERFORMANCE OBJECTIVES

*(6 to 10 Key Objectives for each person are ideal)*

R - Rating

Key Objective	Expected Performance Level/Measurable Result	Mid-Year Review	R



## SECTION II: PERFORMANCE REVIEW

### R - Rating

Key Competency	Expected Performance Level/Measurable Result	Results Achieved	R
<b>1. Leadership:</b> <ul style="list-style-type: none"> <li>• Vision</li> <li>• Team Building</li> <li>• Flexibility</li> <li>• Stress Management</li> <li>• Commitment</li> </ul>	Defining a vision and guiding individuals and groups towards the vision, while maintaining group cohesiveness, motivation, commitment and effectiveness.		
<b>2. Communication:</b> <ul style="list-style-type: none"> <li>• Verbal Communication</li> <li>• Listening Skills</li> <li>• Written Communication</li> </ul>	Communicating effectively so that messages are understood; understanding the essence and subtle meanings of what is said.		
<b>3. Technical Knowledge</b> <ul style="list-style-type: none"> <li>• (Insert job specific requirements)</li> </ul>	Understands and employs the technical knowledge required to achieve responsibilities.		
<b>4. Lifelong Learning</b> <ul style="list-style-type: none"> <li>• Self-directed Learning</li> <li>• Teaching/Mentoring</li> </ul>	Continually learning and promoting the value of learning for self and others.		
<b>5. Consumer/Community Responsiveness and Public Relations</b> <ul style="list-style-type: none"> <li>• Public Relations</li> <li>• Responsiveness</li> </ul>	Responding to consumer/community needs; actively promoting positive relations with the community and consumer groups.		
<b>6. Conceptual Skills:</b> <ul style="list-style-type: none"> <li>• Analysis &amp; Synthesis</li> <li>• Problem Solving</li> <li>• Systems Thinking</li> </ul>	Identifying and analyzing situations and problems so that viable solutions are found; approaching tasks and problems so that total systems and strategies are taken into account.		
<b>7. Results Management</b> <ul style="list-style-type: none"> <li>• Planning</li> <li>• Implementation</li> <li>• Monitoring/Evaluating</li> </ul>	Establishing courses of action for self and others to achieve results.		
<b>8. Resource Management</b> <ul style="list-style-type: none"> <li>• Human Resources</li> <li>• Financial Resources</li> <li>• Capital/Material Assets</li> <li>• Information</li> </ul>	Promoting compliance with ethical and legal requirements.		
<b>9. Compliance to Standards</b> <ul style="list-style-type: none"> <li>• Ethical Standards</li> <li>• Legal Standards</li> </ul>			



### **SECTION III: OTHER RESULTS**

Record contributions the individual made during the year either instead of, or in addition to, previously established expectations and objectives:

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### **SECTION IV: DEVELOPMENT IN CURRENT JOB**

Record comments that describe current job development needs, plans to address identified needs, and activities that provide broadening experiences and additional training:

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### **SECTION V: EMPLOYEE'S COMMENTS**

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## SECTION VI: SIGNATURES & DATES:

Employee signature indicates that discussion with supervisor has taken place and does not signify approval with ratings given or comments made.

### Planning:

_____	_____
Employee	Supervisor
_____	_____
Date	Date

### Mid-Year Review:

_____	_____
Employee	Supervisor
_____	_____
Date	Date

### Performance Evaluation:

_____	_____
Employee	Supervisor
_____	_____
Date	Date