

Planning and Performance Review Employees' Guide

Purpose:

Planning and Performance Reviews provide a structured process for regular feedback on work performance, as well as coaching towards work-related learning and career development goals: The primary aims of this process are to:

- Ensure that all Acadia employees are given the direction and support they need to excel in their jobs
- Align individual performance with broader University goals and objectives
- Provide opportunities to develop learning and development strategies to meet professional and personal needs
- Recognize employee accomplishments and achievements
- Identify performance gaps and provide support and guidance to improve performance
- Provide managers & supervisors with the information they need to make informed human resources management decisions

What is expected of you as an employee?

Your primary roles and responsibilities in the Planning and Performance Review process are to:

- Collaborate with your manager/supervisor to develop clear and achievable performance and development objectives
- Take personal ownership for achieving performance objectives and learning goals
- Actively seek and provide feedback when you need information, tools, or assistance to perform your work
- Identify obstacles to meeting objectives and recommend solutions
- Be open to constructive feedback and advice

The Planning and Review Cycle:

Employee performance planning and review is a continuing cycle, not just a once-a-year activity.

- The **planning phase** is the starting point of the process. At the outset of the cycle, you and your manager will discuss organizational and individual priorities for the upcoming year, and set realistic and attainable performance and learning objectives. You will be using the Annual Planning and Performance Review to document performance and development objectives and success measures.

- The **monitoring phase** occurs throughout the year. Work and learning objectives should be discussed during the year, in formal or informal conversations. These discussions also provide an opportunity to realign the performance plan if priorities or circumstances have changed.

- In the **assessment phase**, you will meet with your manager to review and assess your progress against your objectives. You will review your accomplishments and identify areas of improvement. The Annual Planning and Performance Review serves as the official document of these discussions and performance assessments. At this time, you will also establish new objectives for the next performance period.

- For SEIU employees, the assessment phase occurs between November 15th and January 15th (as per Article 39 of the Acadia/SEIU collective agreement).

For AUPAT employees, the assessment phase occurs during January and February of each year.

The supervisor and employee should sign the Annual Planning and Performance Review acknowledging that a discussion on performance planning and review has taken place. The form should then be countersigned by the Reviewing Officer (the person to whom the supervisor in question reports). When the PPRA is completed and signed, the original should be submitted to Human Resources, a copy provided to the employee, and a copy retained by the supervisor.

Making it Work:

There are a number of things you can do to help make performance planning and review effective:

- Prepare. Prior to meeting with your manager, start thinking about your work and personal development objectives. You may wish to review your job description and your previous year's PPRA. Think about procedures or process improvements that would make your work more efficient and effective. Think, and be prepared to ask any questions you may have, about how your work is connected to the unit's or Acadia's strategic priorities, goals, and objectives.
- During the Performance Planning and Review discussion, work with your manager in establishing "SMART" objectives that are specific, measurable, achievable, realistic and relevant, and time-bound.
- For each objective, you and your manager will also agree on a number of success measures. These success measures will help you and your manager to determine how well the objective has been achieved. Measure of success can include:
 - ✓ accuracy,
 - ✓ timeliness,
 - ✓ feedback from clients or colleagues,
 - ✓ quantity,
 - ✓ decrease in processing time,
 - ✓ attention to detail,
 - ✓ completeness,
 - ✓ independent performance of work,
 - ✓ finding imaginative solutions.
- Once your manager has established objectives, discuss what support you feel you will need to achieve successfully the objectives.
- Identify and prioritize your learning and development needs. Taking into account your work objectives, identify those areas where you will need to develop or improve your knowledge, skills, and competencies. Learning can be formal (workshops, training) or informal (coaching, self-study, challenging assignments).
- Be prepared to receive feedback effectively. Listen attentively to the feedback, be open and receptive to new ideas and opinions, focus on the content and not the person, make sure you understand the comments and ask questions for clarification, reflect on the feedback and decide what to do in response to it, and follow up.