

# PERFORMANCE PLANNING FORM



*To be completed in Part I of the Classified and IT Employees Performance Management Structure and Time-line and to be used in conjunction with the Supervisor Checklist Form (#PM4).*

**Employee's Name:**

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**Title:**

**Role:**             *Administrative/Technical*             *Professional*             *Manager*

**Department:**

**Supervisor's Name:**

**Review period:**

**Date of Review:**

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*The performance planning session is an opportunity*

- **to review the entire performance management system including all the steps in the time-line,**
- **to discuss the philosophy of a performance partnership, and**
- **to clarify expectations of supervisor and employee.**

A. 1. Review position description (JIQ) and employee's current responsibilities. Identify changes in responsibilities.

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A. 2. Review university missions/values/goals. Highlight employee responsibilities that directly affect the university/department/division mission/values/goals.

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B. Review seven competencies and employee's role assignment. Discuss behavior statements and ways these statements will be used in the evaluation. Comments? Questions?

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#PM2

C. 1. Draft employee goals

<i>Work to be accomplished</i>	<i>Time-line for work to be accomplished</i>	<i>Resources needed to accomplish work</i>	<i>Measures to be used</i>

C. 2.

<i>Competency(ies) to be developed</i>	<i>Time-line for competency development</i>	<i>Action plan for competency development</i>	<i>Resources needed for competency development</i>	<i>Measures to be used</i>

D. Feedback opportunities

1. Discuss and agree on multiple assessors option  *will be used*  *will not be used*

Names of possible assessors: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Discuss and agree on using supervisor feedback form  *will be used*  *will not be used*

E. Acquire signatures

**Signature of Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Signature of Supervisor:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Employee  
Supervisor