



THE PERFORMANCE DEVELOPMENT DISCUSSION

INSTRUCTIONS AND ACTION PLAN

Material for a successful performance development discussion.

- Instruction Guidelines and Action Plan Booklet
- Performance Progress Update Discussions
- Prior to the Performance Development Discussion –the Employee’s Booklet
- Prior to the Performance Development Discussion – the Manager/Leader’s Booklet
- Career Planning and Development Booklet.



Overall Guidance Instructions and Action Planning

What is a Performance Development Discussion?

Performance appraisal discussion, personal development interview, and even performance planning meeting are all different names for the same thing. In this booklet (which is part of a four booklet series) we have chosen to call a formal appraisal meeting between a manager and an employee the **Performance Development Discussion**. One definition of a Performance Development Discussion is *“a planned, properly prepared and regular discussion between manager and employee concerning an individual’s goals and the competencies needed to achieve future success”*. This guidance booklet (and booklets for both manager and employee to utilize) affords the opportunity for both parties engaged in the discussion to plan and prepare properly and to make the whole experience a positive and worthwhile one.

Why bother conducting a Performance Development Discussion?

Managers often argue against sitting down with their employees to discuss performance for a variety of reasons. These include *“We talk with each other about performance every day”, “We know each other too well to bother with this formal stuff”, “We work in the same room/office and talk all the time – this is a waste of both of our time”* or even *“We shouldn’t wait for quarterly or end of year formal discussions to discuss performance – we should do it whenever there is a problem”*. Although some of these counter arguments may be legitimate, they are rarely a substitute for a well-prepared, focused and high quality conversation concentrating on goals and achievement and what is necessary to achieve future success. As such, both parties will always benefit from a Performance Development Discussion, even if it is to only slightly adjust course or to recognize a job well done.

The manager’s challenge

Your challenge as a manager is to maintain a progressive and systematic interest in the individual’s performance and general motivation and well-being. This can be successfully done by engaging in regular performance update discussions and then using the end of cycle Performance Development Discussion to encourage an open two-way dialogue. In this discussion, the manager should focus upon sharing information about targets met or missed, competency development experiences, future training needs, career aspirations and future goals and objectives that need to be set.

The employee’s challenge

Your challenge as an employee is to involve yourself in the Performance Management System in a positive and committed way and to use the progress and end of cycle Performance Development Discussions as a means to share information about your experiences with your manager and elicit their support for your efforts to achieve your targets.

The Performance Development Discussion – Guidelines and Action Planning	This booklet provides you with a short introduction and guidelines for successfully handling the Performance Development Discussion, including space to jointly develop firm action plans around objectives and competency development expectations.
The Performance Progress Update Discussion	This booklet provides a structured format within which a manager and employee can focus on progressive performance and make any necessary short term adjustments.
Prior to the Performance Development Discussion – The Manager’s Booklet	This booklet provides a structured format within which a manager can prepare themselves for a Performance Development Discussion and to focus on the most important issues that need to be covered.
Prior to the Performance Development Discussion – The Employee’s Booklet	This booklet provides a structured format within which an employee can prepare themselves for a Performance Development Discussion and to focus on the most important issues that need to be covered.
Career Planning and Development – Manager and Employee Action Planning	This booklet provides a structured format for employees to express their broad career interests and for managers to record their forecast of long term individual potential.

GOAL/OBJECTIVE SETTING

Name of Appraisee: _____ Position: _____

Department/Location: _____ Review Period: _____

The Goal/Objective Setting template is used to communicate performance standards and as a basis for end of cycle evaluation.

INSTRUCTIONS Individual/Appraisee: At the beginning of the review period, describe up to five goals/expected results that you will achieve in the next review period. Prioritize those goals/expected results as to their importance to your job, using a scale of **1=low to 5=high**. Write the organization's or supervisor's goal to which your goals/expected results support in the "Related Goal" area. At the end of the review period, complete the "Results Achieved" portion. **Supervisor:** At the end of the review period complete the "Supervisor's Summary Statement" and assign a rating for the review period.

1. GOALS/ACCOUNTABILITIES/EXPECTED RESULTS

Prioritize the goals/expected results in terms of their importance to the job being performed (1-5)

Related goal (organization's or supervisor's goal): _____

Goals/expected results:

Results achieved:

_____	_____
_____	_____
_____	_____

Supervisor's summary statement:

2. GOALS/ACCOUNTABILITIES/EXPECTED RESULTS

Prioritize the goals/expected results in terms of their importance to the job being performed (1-5)

Related goal (organization's or supervisor's goal): _____

Goals/expected results:

Results achieved:

_____	_____
_____	_____
_____	_____

Supervisor's summary statement:

Rating

- Exceeds performance requirements
- Meets performance requirements
- Does not meet performance requirements

Copy this page to record other goals or objectives for the review period ahead.

ACTION PLANNING COMPETENCY PROFICIENCY GRID

The Janus Performance Management System allows you to develop a list of competencies (from a total library of 36) that are likely to be most relevant to the job role and goals/objectives that have been set. A minimum of three and a maximum of ten should be chosen.

The appraisee should list 3-10 competencies agreed with the manager and then rate each of them on the right.

	Poor					Excellent				
1. _____	1	2	3	4	5	6	7	8	9	10
2. _____	1	2	3	4	5	6	7	8	9	10
3. _____	1	2	3	4	5	6	7	8	9	10
4. _____	1	2	3	4	5	6	7	8	9	10
5. _____	1	2	3	4	5	6	7	8	9	10
6. _____	1	2	3	4	5	6	7	8	9	10
7. _____	1	2	3	4	5	6	7	8	9	10
8. _____	1	2	3	4	5	6	7	8	9	10
9. _____	1	2	3	4	5	6	7	8	9	10
10. _____	1	2	3	4	5	6	7	8	9	10

List your three greatest strengths:

1. _____
2. _____
3. _____

List your three greatest opportunities for improvement:

1. _____
2. _____
3. _____

Both the individual appraisee and manager can complete this template. To do this, the individual should copy this blank page and give it to their manager to complete. Notes can then be compared at the Performance Development Discussion.