**PERFORMANCE DIALOGUE PLAN & APPRAISAL FORM**

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| --- | --- |
| Employee Name**:** | Date**:**  |
| Position**:** | Role (ex. HRM1A, SAF2B, etc.): |
| Department / Unit**:** |
| Immediate Supervisor's Name**:**  |
| Reference Period**:**  |

**Unit Objectives**

Unit objectives and priorities should be cascaded down to the individual staff member. For examples, please visit the HR Website under: https://www.mcgill.ca/od/performance-management/performance-dialogue

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| *Please note:** Objectives can be reviewed and adjusted during the reference period following an agreement between the staff member and the immediate supervisor.
* In addition to immediate individual tasks, additional work objectives may be linked to university-wide priorities such as My Healthy Workplace initiatives like Wellness, Sustainability, Continuous Improvement and Mental Health in the Workplace.
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**Individual Work Objectives**

Objectives should be SMART (Specific, Measurable, Achievable, Realistic, Timed). For examples, please visit the HR Website under: https://www.mcgill.ca/od/performance-management/performance-dialogue

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| *Please note:** Objectives can be reviewed and adjusted during the reference period following an agreement between the staff member and the immediate supervisor.
* In addition to immediate individual tasks, additional work objectives may be linked to university-wide priorities such as My Healthy Workplace initiatives like Wellness, Sustainability, Continuous Improvement and Mental Health in the workplace.
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| **Objective # 1** |
| **Employee Comments at Mid-Year Review:** |
| **Supervisor Comments at Mid-Year Review:** |
| **Employee Comments at Year-End Review:** |
| **Supervisor Comments at Year-End Review:** |

**Individual Work Objectives (cont.)**

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| **Objective # 2** |
| **Employee Comments at Mid-Year Review:** |
| **Supervisor Comments at Mid-Year Review:** |
| **Employee Comments at Year-End Review:** |
| **Supervisor Comments at Year-End Review:** |

**Individual Work Objectives (cont.)**

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| **Objective # 3** |
| **Employee Comments at Mid-Year Review:** |
| **Supervisor Comments at Mid-Year Review:** |
| **Employee Comments at Year-End Review:** |
| **Supervisor Comments at Year-End Review:** |

***Note:*** *To add additional objectives, copy/paste the entire objective table block.*

**Behavioural Competencies**

In completing this exercise, please consult our Behavioural Competencies Toolkit for examples of competencies and position targeted levels per job family on the HR Website under:

<https://www.mcgill.ca/od/performance-management/behaviour-competencies>

*Note:* Employees and Supervisors must explore and agree upon 1 to 2 competencies that would be most valuable to enhance the employee’s performance, job satisfaction, and career aspirations. Supervisors should also recognize with specific examples those competencies that the employee demonstrates particularly well.

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| **Change Agility**Embraces change and improvement to move the University ahead | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |
| **Resourcefulness**Gets things done efficiently and resource-effectively | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |

**Behavioural Competencies (cont.)**

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| --- | --- | --- |
| **Teaming**Contributes to or builds effective teams | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |
| **Managerial Courage**Makes and stands behind tough decisions | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |
| **Self-Awareness and Management**Practices emotional Maturity | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |

**Behavioural Competencies (cont.)**

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| --- | --- | --- |
| **Client Service Orientation**Provides excellent service to students, staff, the community, and internal clients | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |
| **Performance Orientation**Takes ownership of or fosters accountability for delivering results | Based on your job profile, please indicate your expected proficiency level (A to D)Choose a level | **Comments:** |

**Training and Development**

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| Technical skills and/or behavioural competencies to develop | Capture methods by which these skills will be developed (including, but not limited to, training, volunteer service, and committee experiences that reinforce behavioural competencies) |
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**Career Aspirations and Associated Development**

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| Discuss the employee’s aspired role / career path, timeline and associated development throughout the year. Other than training, examples of development could involve Informational Interviews, Job Shadowing, Committee Service, My Healthy Workplace Ambassadors, Sustainability Ambassadors, McGill24, etc. |
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***The Performance Dialogue Plan and Appraisal Form help to inform the merit recommendation of an employee during the given fiscal period. Please review and sign the last page of this form at each stage of the Performance Dialogue process.*** The signing of the staff member on this form attests that she/he has seen the content of this assessment, but does not necessarily confirm that he/she agrees with the assessment. The staff member is authorized to write an addendum document/letter to explain the reason of his/her disagreement with the assessment and to ask that it be added to the original form.

***Performance Dialogue Plan***

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|  |  | **Date:** |
| **Employee’s Signature:** |  | **Date:** |
| **Immediate Supervisor's Signature:** |  | **Date:** |
| ***Performance Dialogue Mid-Year Discussion*** |  |  |
|  |  | **Date:** |
| **Employee’s Signature:** |  | **Date:** |
| **Immediate Supervisor's Signature:** |  | **Date:** |
| ***Performance Dialogue Year-End Appraisal*** |  |  |
|  |  | **Date:** |
| **Employee’s Signature:** |  | **Date:** |
| **Immediate Supervisor's Signature:** |  | **Date:** |

* An [Individual Development Plan](https://www.mcgill.ca/od/files/od/individual_development_action_plan_-_february_2022.doc) can be initiated by either the supervisor or the employee to help design a detailed action plan for a specific skill or competency.
* A [Performance Improvement Plan](https://www.mcgill.ca/od/files/od/performance_improvement_plan_template.xlsx) may be required to help correct an existing gap between the expected performance and the actual performance of the employee.