



## The Performance & Professional Development Plan (PPD)

This assessment tool is a systematic and organized approach that enables management to focus on achievable goals and to attain the best possible results from available resources. It aims to increase organizational performance by aligning university goals with employee objectives. Employees within an organization are assigned a set of specific objectives that they attempt to accomplish during a review period. The basic principle behind this assessment tool is for employees to have a clear understanding of the roles and responsibilities expected of them. Employees can then understand how their activities relate to the achievement of the university's goals. (See the PPD Employee Handbook for additional information and resources.)

There are three phases: **Performance Planning, Coaching and Feedback, and Performance Review.**

- 1. Performance Planning:** the employee and supervisor individually and collaboratively define specific goals and objectives correlated to the university objectives and culture enhancement. Individual goals are written in a SMART format with consensus on measurement, clarity on expectations and aligned to interdependent success.
- 2. Coaching and Feedback:** Individuals seek and receive coaching and feedback on the **Performance and Professional Development Plan (PPD)** progress and demonstration of the agreed upon goals, and meet formally with their managers for “check-in” sessions. Either the employee or the manager can initiate the coaching and feedback.
- 3. Performance Review:** Employees and their manager review the **Performance and Professional Development Plan (PPD)** and the accomplishments to date relative to the identified goals, any shortfalls and development opportunities. Organizational performance is increased and culture impacted positively through goal achievement aligned to university goals. Evaluations are conducted periodically to determine whether the employees reached their agreed **PPD**.

We believe it is important to continuously evaluate our systems and processes to add value to the organization. We would like your feedback on the PPD process. If you have suggestions for improving the process for employees or supervisors, please send your comments to [HR@lewisu.edu](mailto:HR@lewisu.edu). You can also use the space provided below and forward to the Office of Human Resources, Unit 290.

**Performance & Professional Development Plan (PPD)**

**Assessment Period:**

**Employee Name** \_\_\_\_\_ **Supervisor** \_\_\_\_\_

**Title & Department** \_\_\_\_\_ **Date** \_\_\_\_\_

**STATUS OF PRIOR YEAR'S GOALS/OBJECTIVES**

Comments:

- 1. \_\_\_\_\_ Completed In Progress Deleted
- 2. \_\_\_\_\_ Completed In Progress Deleted
- 3. \_\_\_\_\_ Completed In Progress Deleted

**GOALS FOR (DATE)**

**STEPS TOWARD GOAL FULFILLMENT**

1.

2.

3.

Describe how the individual goals support departmental goals.

Comments:

**Performance & Professional Development Plan (PPD)**

**Assessment Period:**

| <b>Competencies</b>   | <b>Standards Met</b>     | <b>Standards Exceeded</b><br>(needs commentary) | <b>Opportunity for Growth</b><br>(needs commentary) |
|---|--------------------------|---|---|
| <b>Check the appropriate box. Responses other than "Standards Met" need commentary.</b> |                          |   |   |
| Motivation  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Timeliness  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Organization  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Professionalism: Image/Presentation   | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Quality of Communication  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Resource Administration   | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Planning Effectiveness  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Decisiveness  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Collaborative Relations   | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Mission Advancement   | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| University/Community Involvement  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Currency of Required Skills   | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |
| Other: _____  | <input type="checkbox"/> | <input type="checkbox"/>                        | <input type="checkbox"/>                            |

**Employee Signature** \_\_\_\_\_

**Date** \_\_\_\_\_

**Supervisor Signature** \_\_\_\_\_

**Date** \_\_\_\_\_