**Performance Management Record**

**Process Document**

Performance Management is an on-going process that involves a continuous cycle of setting goals and objectives, observing performance and exchanging feedback. The Performance Management Record (PMR) considers both organizational and personal performance and provides opportunity for continuous dialogue regarding performance between employee and supervisor.

The PMR document uses a three-phase dialogue process as follows:

* Planning
* Interim Review
* Summary

**Planning** – The planning phase coincides with the Board of Governor’s (Board) approval of the Performance Measures for each fiscal year (typically June for the following year). This planning phase is to be completed in the summer/early fall and submitted to Human Resources by no later than the end of October for managers, supervisors and chairs. This record is intended to begin with Executive and cascade down to the management level to ensure alignment of goals and objectives. During the planning phase, employee and supervisor establish a mutual understanding about the performance expected during the next performance period.

The following sections are to be completed in the planning phase:

1. **Key Responsibilities/Role Description:** This is a summary of key roles and responsibilities.
2. **Lethbridge College Goal Setting: You will need to review the PMR of your supervisor to align your goals with theirs and the overarching institutional goals**
3. *Individual Leadership Goals:* goals set as a leader that contribute to overall effectiveness in your role.
4. *Lethbridge College Performance Measures (Appendix A) Goals: S*pecific additional goals with respect to achieving outcomes in the relevant fiscal year identified by the following categories:

Strategic Plan

Operations

People

1. Other Interests/Responsibilities: This section could include key priorities within your area of responsibility outside of those aligned directly with the Performance Measures.
2. **College Committees/Internal Service –** What internal committees do you participate in
3. **External Service –** What professional obligations and committees are you involved in outside of the college
4. **Career and Professional Development Plans –** What career and professional development plans/opportunities have been identified for this coming year

**Interim Review** – The interim review phase of the PMR provides an opportunity to reinforce progress that meets or exceeds expectations on goals and encourages you to review what has been accomplished to date. More specifically, this phase is designed to address and/or identify revisions to plans, educational needs, developmental opportunities and/or changes to goals/priorities and so on. This review also fosters open communication and ensures ongoing review and discussion with your supervisor throughout the year. Interim dialogues are optional and occur as necessary during the performance cycle.

**Summary** – The summary phase is the final phase and is to be completed and submitted to Human Resources by no later than August of each year. The summary phase focuses on dialogue between you and your supervisor about current and future career/development plans, and a review of your performance and achievement of goals/objectives set during the past performance period.

The following sections are to be completed in the summary review process:

1. **Key Responsibilities/Role Description:** Review your key responsibilities and role description and reflect on your performance overall in your role this past year. Speak to what comes naturally to you? What did you find more challenging? What do you feel requires more attention this coming year? (this may form goals for the coming year)
2. **Core Competencies –** (***To be completed only during the summary phase)*** – *For managers/supervisors/chairs these core competencies are consistent with those identified in the Checkpoint 360 tool. Review your most recent Checkpoint 360 results to assist with your self-assessment of these competencies. For executive and CLC these competencies are those approved by the Board.*

*Under each competency: do a self-report of your capabilities based on the written definition – consider loosely using a five-point scale where five is you have mastery and one is where you are just beginning to know what this is. Also consider if you rate yourself less than four, what specific actions you will undertake to develop to a four or five.*

1. **Individual Leadership Goals**

Comment on your achievement or progression to date on these goals and consider how these results have contributed to success in other areas. Consider what your specific contributions have been this year.

1. **Lethbridge College Performance Measures**

Reflect and comment to what your specific contributions were to achieving the scorecard outcomes. Comment on what specifics you achieved based on what you included in your planning PMR.

1. **College Committees/Internal Service**
2. **External Service**
3. **Career and Professional Development Plans**

For these three sections (five, six, and seven), provide a general indication of what you gained from these experiences. What was your role, what was of value, what contributions did you make and what was most helpful overall? Identify any points of interest where this service contributed to your growth and development in the past performance period.