

The Annual Academic Staff Planning exercises are done in the summer. *This is not the annual merit exercise which is done in the spring.*

The purpose of this exercise is to allow the supervisor to reflection on:

- how his or her supervisory performance impacts on the staff member's productivity and professional growth;
- where the project(s) is going in the next year;
- how the member of his or her staff is going to help get there (activities);
- what will optimize the contribution of the staff member (professional development); and,
- how the supervisor will know if the staff member helped the project get to where the supervisor wanted it to go (results).

For the staff member, this exercise allows for reflection on:

- the alignment of his or her work with the mission of the project;
- procedural/organizational issues that impact the ability to accomplish work;
- professional development that would optimize his or her contribution; and
- professional development that would advance his or her career.

ALL STEPS SHOULD BE COMPLETED BY JULY 23, 2010

Consider addressing both phases in one meeting

Evaluation Phase – looking back

1. The supervisor should fill in Column C. For each area of responsibility, the supervisor should note whether the employee's performance during the period does not meet, meets, or exceeds the expectations that are explicit or implicit in Column B. The supervisor should consider the specific tasks, deadlines, products, or publications that were agreed to, and consider quality, quantity, and timeliness.
2. The employee and supervisor should meet to discuss the supervisor's assessment of performance.
3. The employee should make any comments in Column E (page2). The supervisor should make any additional comments in Column F. (optional)
4. The employee and supervisor should sign the form. Please send an unsigned, electronic copy of the form to the Human Resource Manager.
5. The completed form should be used as the basis for the next performance planning cycle. In particular, training and education needs should be considered for any area in which performance did not meet expectations.

Performance Planning Phase – looking forward

The employee should:

- List important areas of responsibility in Column A. These might include the different projects on which s/he works or the different functions of the position (e.g., outreach, research, administration). It may be useful to provide time percentages spent on each area of responsibility, but this is not required.
- List, in Column B, the tasks, work activities, or products that contribute to the areas of responsibility listed in Column A. These are the performance expectations for the performance planning period (typically from July 1 to June 30).
- Use the job description, original position vacancy listing, grant proposals, and promotional requests as sources to start from in developing the areas of responsibility and specific tasks in columns A and B, respectively.
- In Column D (page 2) list any job related development goals, career goals, and training & education needs (optional)

2. The employee should share the form with her/his supervisor prior to the scheduled evaluation/planning meeting.

3. The supervisor should review the form in order to:

- Ensure that the areas of responsibility in Column A reflect the intended scope of work for the position.
- Ensure that the specific tasks, goals, products, and deadlines in Column B reflect the quality, quality, and timeliness of the work expected during the planning period.
- Suggest training and education needs.

4. The employee and supervisor should meeting to discuss the areas of responsibility and tasks, work activities, or products, and training and education needs. Ideally, there should be agreement on these. The Human Resource Manager is available to answer questions and/or help turn problems into opportunities.

5. The form should be signed and dated by both employee and supervisor at or shortly after the planning meeting. Please send an unsigned, electronic version to the Human Resource Manager.