**STEP 3: Annual Performance & Development Conversation**

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| Employee Name: |  | Manager Name: |  |
| Position: |  | Department/Faculty: |   |
| Date: |   |

**Guidelines**

The Annual Performance and Development Conversation is an important part of the overall performance development program at UOIT. It is an opportunity to connect and reflect on the successes of the year and accomplishments to date.

The questions provided in the form are to be used as a guiding tool for coaching conversations between the manager and the employee. Notes can be recorded as necessary by the manager.

Both the manager and the employee are required to sign the assessment. The form will be kept in the employee’s file and reviewed by the Human Resources department.

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| **1. Performance Goals Accomplished** List 2-3 achievements you have accomplished in the last year and summarize the achievements and progress you have made towards meeting your goals. |
| Goals Accomplished | What went well? | What could have gone better? |
| 1. |   |   |   |
| 2. |   |   |   |
| 3. |   |   |   |

**Questions for Dialogue and Discussion:**

* What have been your greatest successes at work? What are some examples of accomplishments you are proud of? How did these successes or accomplishments impact the organization?
* What enabled you to do your best work?
* How could you be better supported in achieving your goals?
* What has been your biggest challenge, and how did you overcome this?

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| **2. Professional Development Accomplished**List 2-3 learning activities you participated in over the last year. Learning activities may include: workshops, conferences, webinars, podcasts, cross training, stretch assignments and/or professional and leadership development books read. |
| Learning Activity: | Progress: | Comments: |
| 1. |   |   |   |
| 2. |   |   |   |
| 3. |   |   |   |

**Questions for Dialogue and Discussion:**

* What opportunities for learning and growth have you recently found or created for yourself?
* What skills did you develop as a result of these learning opportunities?
* What strength (s) did you develop that you would like to build on as we move into the next performance and development cycle?

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| **3: Summary and Overall Feedback** |
| Employee comments: |
|   |
| Manager comments: |
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**Question for Dialogue and Discussion**

* Looking at the department/faculty as a whole, what could be done differently?
* On a scale of 1 to 10, how have your energy levels been? What would it take to move that up a number?
* Do you have everything you need to perform your role to the best of your ability?
* Has your progress this year helped you in moving the needle closer to meeting your career goals? What can you do to move closer to meeting this goal? What support do you need?

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| **To be completed by the manager:** |
| Overall Rating:  |  |
|  |  | Exceeds Expectations  |   | Meets Expectations |   | Does Not Meet Expectations |
| *\*Please contact your Human Resources Partner, if you have selected “Does Not Meet Expectations”.* |

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| --- | --- | --- |
| Employee Signature: | Manager Signature: | Date received in HR: |
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*\*An employee’s signature means they have completed the Year-end Performance and Development Discussion with their manager and reviewed their manager’s comments. An employee’s signature does not mean the employee agrees with the comments noted or the overall assessment.*