

EMPLOYEE NAME SampleDATE: Sample

This is where you document the completion of the current performance and development cycle.

Review your notes from your Step 2 conversations then complete the following sections.

What went well? Summarize achievements or progress made towards meeting goals and learning objectives.

Goal #1 – customer satisfaction survey results increased by 12.5% While this is slightly below the target of 15% it is a considerable achievement given the timing of the new policies that created confusion and difficulties for clients.

Goal #2 – the User Manual project got off to a slow start but is well under way. Next step is for the team to provide feedback on the draft.

Goal #3 – team meetings are much more effective, and have not run overtime since October. I have applied several meeting management techniques to ensure all items are covered and am currently working on ways to increase participation from some quieter team members.

Goal #4 – I am enjoying my committee work and look forward to it each month. The relationships I've developed have been helpful in my departmental work. I think I'm making a difference to the outcomes and am grateful for the opportunity to participate in something outside of our department.

What could have been better? Identify any unexpected barriers or challenges and what needs to be done to address them. Bring any outstanding goals forward for the next performance development cycle.

- I'm hoping we can continue to increase client satisfaction scores now that most of the policy implementation issues are complete. This will be a continual learning process for me and will carry on into next year. I would like to continue to bring one client issue to each of our meetings for debrief.
- The user manual project got off to a slow start and as a result I was wasn't able to meet the milestones we originally identified.
- I would like to take the second course I require for my certification, so will put that request in my learning goals for early next year.

List additional accomplishments, contributions and key strengths.

- My openness to learning new skills and then applying them.
- Good technical and analytical problem solving skills have helped us to streamline several processes and reduce error rates.
- Interpersonal communication skills are an asset to the team.

Employee feedback for Supervisor: Looking at the department as a whole, what could be done differently? How could your supervisor better support you and the team?

I appreciate your guidance through some difficult client interactions. I suggest we adopt the practice of debriefing one difficult client interaction at each of our team meetings so we can build skills across the team by learning from each other.

I'm wondering if other staff can be encouraged to participate in university initiatives/committees as I've found it has enriched my work, my understanding of the bigger UVIC picture as well as increasing my on campus network.

Supervisor Summary Comments

You have had a busy year and have made great progress on 3 out of your 4 goals, despite some challenging circumstances, well done! I'm looking forward to seeing the completion of the user manual in the next six months. I appreciate your comments and will adopt your suggestion of adding a standing item to our team meetings. I've appreciated your willingness to learn new skills and apply them in your work, this has benefited the team and operations.

As we discussed let's put "participation in university initiatives/committees" on the agenda for the next team meeting. I would like staff to feel welcome to put ideas forward, although I want to be clear that opportunities will be considered on a case by case basis.

Employee Summary Comments

I will put meetings in our calendars for the next Performance Development Cycle.

- Schedule into your calendars a meeting for **STEP 1** of the next performance and development cycle.
- Print or save all completed forms (**STEP 1**, **STEP 2** and **STEP 3**) and place in department file for reference.

EMPLOYEE sample
SIGNATURE: _____

SUPERVISOR sample
SIGNATURE: _____

Initiate new cycle with [STEP 1 forms](#)