

POLICY 6.4 – Performance Plan and Review

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| Policy Category: | Personnel |
| Subject: | Performance Plans and Review |
| Approving Authority: | Board of Governors |
| Responsible Officer: | Vice-President, Operations and Finance |
| Responsible Office: | Human Resources |
| Related Procedures: | Administrative Procedures for Performance Plan and Review |
| Related University Policies: | |
| Effective Date: | July 1, 2013 |
| Supersedes: | April 21, 1998, December 1, 1998, June 20, 2013 |

I. PURPOSE

This policy outlines the annual performance dialogue and goal setting process for PMA Eligible staff members. It has been developed to achieve excellence in both staff and organizational performance.

II. POLICY

1. The performance dialogue and goal setting plan for PMA eligible staff members has been established to provide an annual opportunity to develop mutually agreed upon goals for individual staff that are aligned with Western's Strategic Plan/Unit Academic, Strategic and/or Operational Plans and to encourage and facilitate ongoing discussion and feedback throughout the year between the staff member and supervisor. The process results in an annual written plan outlining goals and establishing expected outcomes. The purposes of the performance dialogue and goal setting plan are: to improve and enhance a staff member's performance; provide a basis on which supervisors can recognize staff contributions; and, enable staff to plan their own learning and development for their current role as well as future career goals.
2. The dialogue that takes place between the staff member and supervisor is intended to provide the staff member:
 - a) a better understanding of expected skills and attributes and identification of areas for development;
 - b) an understanding of his/her role in achieving the overall Western strategic plan and unit plans;
 - c) a shared understanding of work priorities and performance expectations;

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- d) information about how well the staff member is performing in his/her position;
 - e) a plan for learning and development.
3. Annually, and according to the [Procedures for Performance Plan and Review](#), the supervisor will be required to submit to the Dean/Budget Unit Head and Associate Vice-President, Human Resources an assessment of each staff member on the Performance Dialogue and Goal Setting Form. This assessment will be used to determine the annual Selective (merit) Adjustment in place for PMA Eligible Staff members.