

Planning and Review Form

You will need:

- Role clarity, Competency profile
- A copy of your unit's Key Performance Areas for the review period(done in annual cycles)
- A copy of the strategies of the unit

(The above is aligned with the UWC Institutional Operating Plan)

For the period		(usually one calendar year)
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<u>Staff member</u>			
Name		Staff number:	
Job title		Job grade:	
Department and Faculty/Division			
Time in this position	years	Total service	years

<u>Schedule of meetings (future planning) dates:</u>				
Section 1:	Performance feedback Planning			
Section 2:	Performance Review(s).Formal Discussions planned			
Section 3:	Performance Evaluation symbol	Previous:	Evaluation of performance indicator	Current:

Key Deliverables-key performance areas(KPA's)

Using the information available select no more than 5 - 8 core Key Deliverables which are the most relevant for job performance (prioritise in order of importance).	
1	
2	
3	
4	
5	
6	
7	
8	

Objectives: specific and measurable activities that you plan to achieve within the review period- (use the CD or PDS link on the website for assistance)

These objectives can be supported by action plans.

In support of, Key Performance Area (KPA), number as indicated on page 1: -----

Objectives	Target Date	Performance Measure	Review comments	Final evaluation comments	Evaluation code

KPA number-----

Objectives	Target Date	Performance Measure	Review comments	Final evaluation comments	Evaluation

Competencies	
From the information available select 6 - 8 core Competencies most relevant for job performance.	
Competency	Provide an example of how this is used in your job
e.g. Accuracy	Managing and controlling student marks on the system

Development Needs

Development Action Plan for review period:
 Identify the competencies from the list above that you plan to focus on in the review period (no more than 3). Specify how you plan to improve your competence. Remember to consult the Annual Staff Development Schedule or consult with your HoD and HR consultant.

Competency	Action *	Responsibility	By when:	Review comments	Final evaluation comments

*** Now return to the previous page and enter these Development Actions as further objectives**

Overall evaluation (complete only at end of cycle by HoD) Use the evaluation code provided .		
Exceeds expectations EE	<input type="checkbox"/>	
1 Meets expectations ME	<input type="checkbox"/>	
0 Does not meet expectations NME	<input type="checkbox"/>	
N = New staff member (N) (in job < 3 months)	<input type="checkbox"/>	

Staff Member's comments on the whole evaluation cycle: including the planning, review and evaluation stages. Are you satisfied that the process has been consistent, resulting in an evaluation, that will assist in improvement.	Planning Phase:	
	Review 1	
	Review 2	
	Final Review	

Signatures		
Planning	Staff member's signature	Manager's signature
Review	Staff member's signature	Manager's signature
Final evaluation	Staff member's signature	Manager's signature
Initials and signatures indicate only that the discussions have taken place.		2 nd Level Manager's signature