**Performance and Development Plan**

2019

**Name:** [Enter Name Here]

**Role:** [Enter Role Here]

**Department:** [Enter Department Here]

**Location:** [Enter Location Here]

**Line Manager:** [Enter Name Here]

**Introduction**

The PSI Performance and Development Plan is designed to help you plan out your personal development for 2019. It provides a great opportunity to think constructively about the core objectives of your role, and your own personal goals. As you monitor what you learn about your strengths and areas for improvement, you can use this document to craft meaningful objectives and goals, track your progress with your line manager, and update them frequently as the year goes on.

The last part of this document asks you to identify resources or opportunities you want from the business to help you achieve personal success. As part of the process, the information you write will be shared with your local Human Capital person (but no further). This is so that the data can be used to identify themes in requests and strategically roll out formal development opportunities to support you and your colleagues. It will not be used for any other purposes.

**Process**

The development cycle has 40-minute check-in points at the **start of each quarter** in PSI’s fiscal year. For 2019, you should schedulethe meetings with your line manager for as close as possible to the start of **April**, **July** and **October** (and then January again to begin the 2020 cycle). Here is the process:

1. **There will be a webinar**, entitled “A Guide to Your Performance and Development Plan”, which you can watch to remind yourself of the process below. It will eventually be available through SharePoint and you will be able to access it at any time.
2. **Schedule a 40-minute check-in** with your line manager **in January** to discuss your objectives for 2019**.** In preparation, **complete these activities** in this document:
   * Answer six questions to reflect on your work in the previous three months (Page 3 – skip this if you’re a new starter).
   * Read and answer the corporate security training question (Page 6 – skip this if you’re a new starter)
   * Write some reflections about what you need and want to work on in the next three months (Page 7).
3. **Attend your 40-minute check-in with your line manager**. Spend approximately:
   * 20 minutes on your general reflections of the past three months, including your self-ratings against core objectives, personal goals (if applicable) and updates if appropriate.
   * 20 minutes on opportunities / resources / actions needed for the next three months.
4. **Within one week after** the check-in:
   * **Amend** the content within the plan if needed.
   * **Get your line manager** to complete the “Line Manager Comments” component.
   * **Line Manager shares updated document** with you and your local Human Capital person.
5. **Repeat the process** three months later at the next check-in.

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January 2019

Check-In

**Reflections on Q4 2018**

Looking back across **October, November and December 2018**, use the spaces below to write some reflections. Keep your **responses in each space** to **100 words maximum**.

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| **What did I do/achieve that I am most proud of during the last three months?**   * **Changing the way we work to an agile environment and setting things up, while in the role of Scrum Master** * **Starting the work on VAC2** |
|  |
| **What personal strengths did I use to achieve this/these successes?]**   * **I used my organising skills to sort out the sprints and setup the meetings** * **Helping write the user stories** * **Focus on the team and not me** |
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| **How did other people at PSI contribute to/support my successes?**   * **The other Devs helped by adopting the new way of working without any fuss** |
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| **What experiences did I have, where I feel I could have performed better?** |
| * I feel I need to try and keep the meeting working better |
| **What could I have done differently in this/these situations?**   * **Try and cut of unnecessary chat in the stand ups** |
|  |
| **What can I learn about my strengths and/or development needs from these experiences?**   * **Be more authoritive in the meetings** * **Push more on making sure the admin side of things are kept up to date more** |
|  |

**2019: Core Objective Setting**

In the space below, **your line manager** will **define** **high-level ‘objective areas’** for your role, and **specific** **indicators** under each. The objective areas should align closely to the groups of core responsibilities of your role. The indicators are specific expectations within these areas and will be aligned where possible to business needs.

They may be a combination of tasks and behavioral expectations, but they should always be things that you can observe and measure. Over the year, your objectives may change and evolve along with the business (your line manager will make you aware if this happens).

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| --- | --- |
| **Objective Area 1:** | **[Enter Objective Area Name Here]** |
| Indicators | * Indicator 1 * Indicator 2 * Indicator 3 * Etc. |

|  |  |
| --- | --- |
| **Objective Area 2:** | **[Enter Objective Area Name Here]** |
| Indicators | * Indicator 1 * Indicator 2 * Indicator 3 * Etc. |

|  |  |
| --- | --- |
| **Objective Area 3:** | **[Enter Objective Area Name Here]** |
| Indicators | * Indicator 1 * Indicator 2 * Indicator 3 * Etc. |

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| --- | --- |
| **Objective Area 4:** | **[Enter Objective Area Name Here]** |
| Indicators | * Indicator 1 * Indicator 2 * Indicator 3 * Etc. |

**2019: Personal Goal Setting** [Optional]

**During** the January check-in, you can use the spaces below to **craft meaningful personal goals** for the year ahead. The template provides space for three, but talk to your manager if you want to design a different amount, as this shouldn’t be restrictive. You can also request support from Human Capital for help in defining your goals (please contact Jordon Jones for this support). Remember, this part of the process is completely **optional**.

|  |  |  |
| --- | --- | --- |
| **Goal 1:** | | Learn to make the automated scripts better (10%) |
| **Goal Attainment Scale**  Here is the scale to monitor my progress towards this goal at our next quarterly check-in: | | |
| **1** | Less then 10% = not that good | |
| **2** | 10% faster = good | |
| **3** | More then 10% faster = Amazing | |

|  |  |  |
| --- | --- | --- |
| **Goal 2:** | | Retake my first aide course |
| **Goal Attainment Scale**  Here is the scale to monitor my progress towards this goal at our next quarterly check-in: | | |
| **1** | [Less than expected outcome] | |
| **2** | [Expected outcome] | |
| **3** | [Greater than expected outcome] | |

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| **Goal 3:** | |  |
| **Goal Attainment Scale**  Here is the scale to monitor my progress towards this goal at our next quarterly check-in: | | |
| **1** | [Less than expected outcome] | |
| **2** | [Expected outcome] | |
| **3** | [Greater than expected outcome] | |

**Security & Compliance**

This section of your PDP will be a regular prompt for you and your line manager to check in on the extent to which you are keeping up-to-date with security and compliance training.

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| --- | --- |
| **I have completed my Ninjio training** **within 72 hours of release each month.**  *(Please highlight the relevant box to the right)* | Yes; every month this quarter |
| Mixed; yes in some months, but not in others |
| No; not in any month this quarter |

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| **If the answer above was “mixed” or “no”, use the space below to write some thoughts around why and what actions you will take to ensure next quarter’s response is “yes.”**  *(If your answer was “yes”, you can leave this field blank)* |
|  |

**Final Thoughts**

**During your January check-in**, discuss with your line manager what kinds of projects, tasks, events or broader training opportunities you would like to experience, and what actions you are going to take, in the next three months. Discuss these actions with your line manager to help you know what is realistically achievable.

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| --- |
| **These are the kinds of opportunities or resources I’d like in the upcoming quarter…** |
| * Like to view different Pluralsight videos to learn new things * Learn more about Jira |

|  |
| --- |
| **These are the actions I’m going to take in the next three months…** |
| * Watch videos and read up on Jira |

Finally, **the space below is for your line manager** to enter some final comments after completing your January 2019 check-in. They will then share the most up-to-date version with Human Capital.

|  |  |
| --- | --- |
| **Line Manager Comments** | Date Completed: |
|  | |