



PERFORMANCE & DEVELOPMENT PLANS

LIFE.CHANGING

We believe in life long learning — at any age or stage. Find out how the PDP can empower you to achieve your full potential.

EMPLOYEES



Royal Roads
UNIVERSITY

PERFORMANCE & DEVELOPMENT PLANS

WHAT IS A PERFORMANCE & DEVELOPMENT PLAN?

At Royal Roads University, we prioritize the growth and success of our employees through our Performance & Development Planning (PDP) process. As an employee, you'll use the PDP system each year to set both professional and personal goals in alignment with our university's mission and values.

Through the PDP, you'll collaborate closely with your manager to define your role's responsibilities, establish clear priorities, and outline performance expectations. This ongoing conversation fosters a deep mutual understanding, enhancing effectiveness in achieving both departmental and university-wide objectives. You'll work with your manager to set goals and competencies to focus on during the year. Our PDP system, HR Smart, is there to help you track your progress.

WHY ARE THEY IMPORTANT?

The PDP isn't just about setting goals—it's about fostering supportive relationships, providing recognition and development opportunities, and supporting your continuous improvement. By engaging in reflective assessment of your performance, you not only hold yourself accountable to the goals you set, but also contribute to the collective success of Royal Roads.

The PDP embodies Royal Roads University's core values of caring, creative and courageous. It serves as a framework for managers to act as coaches and mentors, guiding and empowering their team to reach their full potential.

The PDP is more than a process—it's a commitment to growth, collaboration, and excellence that supports your development at Royal Roads University.

4 EASY STEPS TO COMPLETING YOUR PDP

01

SETTING GOALS

You'll meet with your manager to discuss the goals and competencies you plan on developing throughout the year. You'll also add weights to each goal and competency you choose. This is a collaborative process, so once you've inputted your plan into HR Smart you'll both add your e-signature.

02

MID-YEAR REVIEW

At the mid-year review, you'll once again meet with your manager to check in on your progress and make sure you're on track. You can add journal entries to your plan to show your progress, or even kudos from colleagues.

03

FINAL ASSESSMENT

At the end of the year, you'll be asked to rate your performance for the year. You'll rate yourself on each of the weighted goals and competencies you set using the rating scale. You can also provide comments and journal entries to support your rating. Once you've added your e-signature, your PDP is sent to your manager for their rating.

04

YEAR-END REVIEW

Now that both you and your manager have rated your performance, it's time to sign off. Just like in step one, both you and your manager need to provide an e-signature. Your PDP is a tool to track the conversations you're already having with your manager. A successful PDP means that there are no surprises at the end of the year.

SETTING GOALS

01

OVERVIEW

SETTING SMART GOALS

We often hear phrases like “shoot for the moon” or “go big or go home.” While aiming high is natural, setting SMART goals can support your success when setting goals for yourself.

S **Specific** goals indicate exactly what is going to be accomplished, why it’s important and who should be involved.

M **Measurable** goals stress the need for clear criteria to track your progress and define what success looks like once the goal is completed.

A **Attainable** goals are difficult, yet not out of reach. They should require you to stretch and develop new skills and competencies in order to achieve the goal.

R **Relevant** goals are aligned to the organization, department and your own success and development.

T **Time-bound** goals are set within a time frame, giving them a target date. A commitment to a deadline helps focus efforts on completion of the goal on or before the due date.



SMART GOALS

QUESTIONS TO CONSIDER

SPECIFIC

- What do I want/need to accomplish?
- Why is this goal beneficial and meaningful?
- Who is involved?

MEASURABLE

- What milestones will be set to keep me on track?
- How will I know when it is accomplished?

ATTAINABLE

- Is this goal challenging yet realistic?
- What new skills or competencies will I need in order to achieve this goal?

RELEVANT

- Does this seem worthwhile/necessary to the organization, department, and yourself?
- Is this the right time to pursue this goal?
- Does this goal align with RRU's key priorities/strategy?
- Am I the right individual to accomplish this goal?

TIME-BOUND

- When is this due, or when must this be completed/implemented?

HERE TO HELP

WORKING WITH YOUR MANAGER

Working closely with your manager to determine the competencies you will develop for the year is a crucial step in setting impactful and meaningful goals. This collaborative process makes sure that your professional development aligns with both your career goals and the university's objectives.

Here are some tips to guide the conversation:

- **Be proactive:** Share your insights and suggestions on the competencies you believe are essential for your role and your growth.
- **Seek feedback:** Ask your manager for feedback on your performance and areas where they see potential for growth.
- **Align with organizational goals:** Discuss how developing certain competencies can help you contribute more effectively to the team and the university.
- **Set priorities:** Work together to prioritize the most critical competencies to focus on for the year.

GOALS VS. COMPETENCIES

Goals are specific achievements or outcomes you aim to accomplish within a set timeframe. They represent the “what” of your work—what you plan to achieve. For example, completing a project, reaching a sales target, or obtaining a certification are all goals.

Competencies are the skills, behaviours, and knowledge that enable you to achieve your goals. They represent the “how” of your work—how you perform your tasks and interact with others. Examples of competencies include teamwork, leadership, communication, and technical skills. Understanding the key competencies required for your role will help you focus your efforts on areas that will make the most significant impact.

NEED MORE SUPPORT SETTING GOALS?



LinkedIn Learning - Setting SMART Goals



LinkedIn Learning - Goal Setting

MID-YEAR REVIEW

02

OVERVIEW

GOALS: REFLECT, REVISE & REALIGN

The mid-year check-in is your perfect opportunity to revisit the goals set at the beginning of the year. Check-in with your manager to see if these goals still make sense and reflect on your current day-to-day work. Have there been significant accomplishments or new challenges that suggest a need for revision? You might consider whether new goals should be added and how to adjust their importance. Reflect on any notable work that wasn't initially covered and consider adding it as a new goal or journal entry in your PDP. This ensures that all your efforts are recognized and aligned with your development plan.

COMPETENCIES: ALIGN YOUR SKILLS WITH SUCCESS

Competencies are the backbone of your professional growth. During your mid-year review, evaluate whether the competencies set earlier are still relevant and clear in how they contribute to your success. Have you faced challenges or celebrated successes related to these competencies? Document these experiences in your PDP through journal entries. This discussion helps make sure that your skillset remains aligned with your goals and provides a roadmap for further improvement and success.

CHECK-IN: COMMUNICATE & SEEK SUPPORT

Regular and open communication is essential for a successful PDP. Use the mid-year check-in to evaluate the frequency and quality of your conversations with your manager. What's working well? What areas need improvement? Discuss what support you need from each other to support your continued success. This is your chance to provide feedback, seek guidance, and strengthen your working relationship. By addressing these points, you can foster a supportive environment that benefits both your individual growth and the university's success.

MID-YEAR CHECK-IN

AT A GLANCE

- Do your goals still make sense? Are they relevant and reflecting of the actual work you're doing?
- Do your competencies still make sense? Is it clear how they will contribute to your success?
- Have you planned any professional development opportunities for the year?
- Have there been challenges and/or successes to date related to your PDP? Have you documented this through journal entries?



PROFESSIONAL DEVELOPMENT OPPORTUNITIES

Development is key to your career growth. Review the development opportunities available to you at the beginning of the year and consider setting a goal specific to professional development opportunities. At the mid-year review, you should reflect on if you've started or completed any training or learning opportunities. Document these in your PDP through journal entries. Explore new development opportunities that may have arisen and consider how they can enhance your current work, help you achieve your goals, and support your future career aspirations. This proactive approach supports your continuous personal and professional growth.

THE POWER OF JOURNAL ENTRIES

Journal entries are a valuable tool in your PDP. They can be added to specific goals and competencies or placed under the "general appraisal notes" section on the "appraisal information" tab. Whether you're noting kudos and recognition, marking milestones on projects, or reflecting on daily tasks, journal entries provide a comprehensive view of your achievements and challenges.

These entries serve multiple purposes. They help support your final rating at the end of the year by providing concrete examples of your progress and contributions. Additionally, they offer a space for reflection, allowing you to track your development, recognize areas for improvement, and celebrate successes. By consistently updating your journal entries, you create a rich narrative of your professional journey, making your mid-year and year-end reviews more meaningful and insightful.

FINAL ASSESSMENT

03

WRAPPING UP YOUR PDP

As you reach the end of your Performance Development Plan (PDP), it's time to look back and assess your journey. This final assessment is about giving yourself a rating and providing examples from your journal entries to support your evaluation.

UNDERSTANDING YOUR RATING

Your rating should reflect how well you've met the goals and expectations set at the beginning of your PDP. Think about your performance in terms of four categories:

Not Meeting Expectations

If you've struggled with the core responsibilities of your role, had inconsistent performance or attendance, and often needed extra help, this might be where you fall.

Work in Progress/In Training

If you're still learning the ropes or working closely with your manager to meet the job's expectations, this is your spot. Maybe you excel in some areas but haven't quite nailed the full scope yet.

Solid Performance

If you're dependable, do your job well, and contribute positively to your team and the university, you're likely here. You're a key player and consistently demonstrate the skills needed for your role. This rating is the most common.

Exceptional Performance

If you regularly go above and beyond, exceed expectations, and have significant achievements to show, this is where you belong. You're a shining star and may be ready for the next step in your career.



“I KNEW EXACTLY WHAT TO DO...BUT IN A MUCH MORE REAL SENSE, I HAD NO IDEA WHAT TO DO.”

-MICHAEL SCOTT

SUPPORTING YOUR RATING

JOURNAL ENTRIES

To support your rating, review your journal entries from the past year. You may consider adding additional entries to each competency and goal to highlight specific examples where you met or exceeded your goals, or demonstrated a competency. You can also add more general journal entries under the ‘General Appraisal Notes’ section.

- How well did I meet the goals and objectives I set out in my PDP?
- What specific achievements or contributions am I proud of?
- What areas did I excel in?
- Where do I see opportunities for further development?

IMPORTANT REMINDERS

WEIGHTING OF GOALS AND COMPETENCIES

Remember, each goal and competency was assigned a weight at the start of your PDP. This impacts your overall score.

MANAGER’S RATING

After you rate your PDP, your manager will review it and provide their rating.

NO SURPRISES

Your PDP rating should be a reflection of ongoing conversations with your manager throughout the year. There shouldn’t be any surprises.

SOLID VS. EXCEPTIONAL

When evaluating your performance, it’s important to distinguish between “Solid” and “Exceptional.” A “Solid Performance” means you are consistently reliable, meet all expectations, and contribute positively to your team and the university. You demonstrate the necessary skills and competencies for your role and are a dependable colleague.

“Exceptional Performance” goes beyond meeting expectations. It signifies consistently superior performance that significantly exceeds job requirements. Exceptional performers are the “shining stars” who deliver extraordinary contributions, achieve outstanding results, take on unique projects, drive innovation, and inspire their peers. While you may be exceptional in certain areas, an overall rating of exceptional is reserved for those whose contributions stand out across the board and set a high standard. If everyone were rated as exceptional, it would lose its significance.

YEAR-END REVIEW

04

OVERVIEW

REFLECT AND LEARN

This final assessment is more than just a rating; it's an opportunity to reflect on your growth and plan for the future. By taking the time to thoughtfully evaluate your performance, you set the stage for your continued success and development. Take time to celebrate your achievements and identify areas for growth. Your PDP is a roadmap to your professional development, and this assessment is a milestone on that journey.

Now that you and your manager have both provided ratings and comments on your performance, it's time to sign the PDP. Signing the PDP is the last step of the PDP cycle, and acknowledges that you and your manager have met to discuss your performance over the year. When the PDP is ready to sign, you'll get an email notification.





LOOKING AHEAD: PLANNING FOR NEXT YEAR

As you wrap up this year's PDP, it's time to look ahead and start planning for next year. This process involves reflecting on your successes, challenges and identifying areas for further growth:

- Reflect on the goals you accomplished and the skills and competencies you developed.
- Reflect on any challenges you faced and think about how you can overcome them moving forward
- Reflect on which goals are still relevant and consider how they can be adapted or continued into next year's PDP.
- Reflect on the strategic goals of your department and the university, and how your goals contributed to them.

CONTINUING THE CONVERSATION

COLLABORATING WITH YOUR MANAGER

Discuss your reflections and plans next year with your manager. This collaborative approach will help to align your goals with your team's objectives, and make sure you receive the support you need to achieve them.

Regular check-ins throughout the year are a fundamental part of the PDP process and will help keep your PDP on track, and allow for adjustments. Tools like Microsoft OneNote, are a great way to track your regular check-ins, prior to adding them into HR Smart.

HAVE QUESTIONS ABOUT YOUR PDP?

Take a peek at the PDP training videos, and if you're responsible for other employees, check out the PDP Manager Guide.

If you still have questions, your People and Culture team are ready to help you. Get in touch with them [here](#).