



# PERFORMANCE & DEVELOPMENT PLANS

## LIFE.CHANGING

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

## MANAGERS



Royal Roads  
UNIVERSITY

# PERFORMANCE & DEVELOPMENT PLANS

## WHAT IS A PERFORMANCE & DEVELOPMENT PLAN?

At Royal Roads University, we are committed to fostering the growth and success of our employees through the Performance & Development Planning (PDP) process. As a manager, the PDP is your key tool for guiding and supporting your employees in setting and achieving meaningful professional and personal goals that align with our vision, values and goals.

Through the PDP, you will work closely with your employees to define their role's responsibilities, establish clear priorities, and set expectations for performance and development. This structured, ongoing dialogue strengthens alignment between individual contributions, departmental goals, and university-wide objectives.

As a manager, your role in the PDP process is to provide clarity, coaching, and feedback while fostering a culture of continuous development. You will help employees identify competencies and goals to focus on, support them in tracking their progress using our PDP system, HR Smart, and make sure that goal-setting remains an interactive and evolving process throughout the year.

## WHY ARE THEY IMPORTANT?

The PDP is more than just a goal-setting tool — it's a key driver of employee engagement, professional growth, and overall team success. As a manager, the PDP provides a structured way to foster supportive relationships, recognize achievements, and create meaningful development opportunities for your employees.

Encouraging employees to engage in reflective assessment not only strengthens accountability but also makes sure they remain aligned with their goals and the broader goals of the university. By guiding your team through this process, you help create a culture of continuous learning and shared success.

The PDP embodies Royal Roads University's core values of caring, creative, and courageous leadership. It equips you with a framework to act as a coach and mentor — empowering your team, reinforcing expectations, and inspiring excellence.

Ultimately, the PDP is more than a process — it's a commitment to growth, collaboration, and long-term success, ensuring that both individuals and teams thrive at Royal Roads University.

## 4 EASY STEPS TO COMPLETING THE PDP

### 01

#### SETTING GOALS

You'll meet with your employee to discuss the goals and competencies they plan on developing throughout the year. You'll provide feedback on the weights to each goal and competency they choose and adjust to align with the goals of the department. This is a collaborative process, so once you've finalized the employee's plan in HR Smart you'll both add your e-signature.

### 02

#### MID-YEAR REVIEW

During the mid-year review, you'll meet with your employee to check in on their progress, make sure they're on track and adjust goals as needed. At this point they should have added journal entries — or even kudos from colleagues — to their PDP to show their progress.

### 03

#### FINAL ASSESSMENT

At the end of the year, your employee will be asked to assess their own performance by rating themselves on each of their weighted goals and competencies using the designated rating scale. They can also include additional comments and journal entries to support their evaluation. Once they've added their rating, the PDP is automatically sent to you, their manager, for your review and rating.

### 04

#### YEAR-END REVIEW

Now that both you and your employee have completed the performance ratings, it's time to finalize the process. Just like in step one, both of you will need to provide an e-signature. The PDP serves as a tool to document the ongoing conversations you've had throughout the year. 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, encouraging your employees to set SMART goals can support their success when setting goals.

**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 will your employee need from you/department to accomplish this goal?
- Why is this goal beneficial and meaningful?
- Who is involved?

### MEASURABLE

- What milestones has the employee set to stay on track?
- How will you and the employee know when it is accomplished?

### ATTAINABLE

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

### RELEVANT

- Does this seem worthwhile/necessary to the university, department, and the employee?
- Is this the right time to pursue this goal?
- Does this goal align with RRU's key priorities/strategy?

### TIME-BOUND

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

## SETTING UP FOR SUCCESS SUPPORTING YOUR EMPLOYEE

As a manager, collaborating with your employees to identify the key competencies they will develop throughout the year is a crucial step in setting meaningful and impactful goals. This process ensures that their professional growth aligns not only with their career aspirations but also with the university's broader goals.

### Here are some tips to guide the conversation:

- **Be proactive:** Review their role profile in advance and identify key competencies that align with their responsibilities and growth potential.
- **Schedule dedicated time:** Set up meetings early in the process for each stage of the PDP.
- **Provide feedback:** Give employees feedback on their performance and areas where you see potential for growth.
- **Align with organizational goals:** Discuss how developing certain competencies can help the employee 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

As a manager, understanding the distinction between goals and competencies is essential for effectively guiding employee development and performance.

**Goals** define the “what” — the specific achievements or outcomes an employee aims to accomplish within a set timeframe. These are tangible results, such as completing a key project, increasing efficiency, reaching a performance milestone, or earning a certification.

**Competencies** represent the “how” — the skills, behaviours, and knowledge that enable employees to achieve their goals effectively. At Royal Roads, we have 8 leadership competencies found in all role profiles. Strengthening competencies not only supports goal achievement but also enhances overall job performance and career growth.

## NEED MORE SUPPORT SETTING GOALS?



LinkedIn Learning - Forming a development plan



LinkedIn Learning - Your role in managing performance

# MID-YEAR REVIEW

## 02

### OVERVIEW

#### GOALS: REFLECT, REVISE & REALIGN

The mid-year check-in is a chance for employees to review the goals they set at the beginning of the year and make any necessary updates. Schedule a time to meet with your employee to see if their goals still align with their day-to-day work. Have there been significant accomplishments, new challenges, or changes in unit or organizational needs that might require adjustments? Your employee may have new goals to add or existing ones to revise. Check if any key work wasn't originally captured and encourage them to include it as a new goal or journal entry in their PDP. This helps make sure their efforts are recognized and stay aligned with both their development plan and evolving workplace priorities.

#### COMPETENCIES: TRACKING GROWTH

At RRU, leadership competencies form the foundation of professional growth. Each competency is tailored to specific roles, with defined levels outlined in role profiles. During the mid-year review, take time to assess whether the competencies set earlier in the year are still relevant and clearly linked to both employee and departmental success. Have there been challenges or achievements related to these competencies? Encourage employees to reflect on their progress and document key experiences in their PDP journal entries if they haven't already. Recognizing and tracking these moments helps reinforce development and align competencies with evolving responsibilities.

#### CHECK-IN: COMMUNICATE & PROVIDE SUPPORT

As a manager, regular and open communication is essential to supporting your employee's growth and development. The mid-year check-in is an opportunity to assess how often and how effectively you are discussing their progress. Are your conversations providing the clarity and support they need? Are there areas where communication could be improved? Use this time to share feedback, address any challenges, and identify what support you both need moving forward. By fostering open dialogue and reinforcing a strong working relationship, you can help your employee stay engaged, aligned with their development goals, and contribute to the university's overall success.

## MID-YEAR REVIEW CHECKLIST

- Schedule a meeting with your employee. Make sure to review their PDP goals, competencies and journal entries in advance.
- Meet with your employee to discuss their progress, challenges and any adjustments
- Provide constructive feedback and suggest any changes to better align their goals with their role, department and the university's objectives.
- Update the PDP to reflect any agreed-upon changes.



## PROFESSIONAL DEVELOPMENT OPPORTUNITIES

Investing in professional development benefits both employees and the university by enhancing engagement, job satisfaction, and retention. It strengthens team performance, fosters adaptability and innovation, and prepares employees for future leadership roles, contributing to long-term success.

During the mid-year review, check in with your employee about their development plans. Would additional training support their growth? Do they have the time to engage in further learning? Exempt and CUPE employees have access to two HR-funded courses through Professional and Continuing Studies, providing valuable opportunities to build new skills. Encourage them to explore these options as part of their ongoing development.

## CELEBRATING PROGRESS WITH JOURNAL ENTRIES

Journal entries are a valuable tool in your employee's PDP, providing a space to document achievements, challenges, and ongoing development. As a manager, you can add new journal entries to recognize accomplishments, track progress on specific goals and competencies, or leave general notes under the "appraisal information" tab. You can also comment on existing journal entries, offering feedback and reinforcing key moments of growth.

Encouraging regular journal updates helps create a detailed record of your employee's contributions throughout the year. These entries provide concrete examples that support final performance ratings, facilitate meaningful discussions during check-ins, and highlight both successes and areas for improvement. By maintaining a consistent record, you ensure a more insightful and well-rounded evaluation at year-end.

# FINAL ASSESSMENT

## 03

### WRAPPING UP YOUR PDP

As you approach the end of your employee's Performance Development Plan (PDP) cycle, it's time to assess their progress and overall performance. This final evaluation involves assigning a rating based on their achievements and development throughout the year. Use journal entries as a key resource to support your assessment, drawing on concrete examples of successes, challenges, and growth.

### UNDERSTANDING THE RATING SCALE

Your rating should reflect how well the employee has met the goals and expectations set at the beginning of their PDP. Think about their performance in terms of four categories:

#### **Not Meeting Expectations**

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

#### **Work in Progress/In Training**

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

#### **Solid Performance**

If they're dependable, do their job well, and contribute positively to the team and the university, they're likely here. In this category they would be considered a key player and consistently demonstrate the skills needed for their role. This rating is the most common.

#### **Exceptional Performance**

If they regularly go above and beyond, exceed expectations, and have significant achievements to show, this is where they belong. In this category they would be considered a shining star in your department and may be ready for the next step in their career.





***Inspiring people  
with the courage  
to transform the  
world.***

## **SOLID VS. EXCEPTIONAL**

When evaluating performance, it's important to differentiate between Solid and Exceptional ratings.

A Solid Performance means the employee is consistently reliable, meets expectations, and contributes positively to their team and the university. They demonstrate the required skills and competencies for their role and are a dependable team member.

An Exceptional Performance goes beyond expectations, representing consistently outstanding contributions that significantly exceed job requirements. These employees take on unique projects, drive innovation, achieve remarkable results, and inspire their peers. An Exceptional rating should be well-supported with documented journal entries throughout the PDP cycle, providing clear examples of extraordinary achievements.

While an employee may excel in certain areas, an overall exceptional rating is reserved for those who stand out across all aspects of their role. If everyone were rated exceptional, the distinction would lose its meaning.

## **IMPORTANT REMINDERS**

### **WEIGHTING OF GOALS AND COMPETENCIES**

Each goal and competency was assigned a weight at the beginning of the PDP cycle. These weightings impact their overall score at the end of the year, so make sure they accurately reflect their contributions and priorities.

### **RATING THE PDP**

Once your employee has completed their self-assessment, you'll be required to review their PDP, provide your own rating, and offer meaningful feedback. Consider their progress, achievements, and challenges, using journal entries and previous check-ins to support your evaluation.

### **NO SURPRISES**

A final PDP rating should align with the ongoing conversations you've had throughout the year. Regular check-ins and documented feedback should ensure that employees are aware of their standing — there should be no surprises at this stage.

# YEAR-END REVIEW

# 04

## OVERVIEW

### FINALIZING THE PDP

As a manager, the year-end Performance Development Plan (PDP) review is more than just assigning a final rating—it's an opportunity to recognize accomplishments, reflect on progress, and set the foundation for future growth. A well-thought-out evaluation reinforces employee development and strengthens engagement.

At this stage, both you and your employee have provided ratings and comments on their performance. Take the time to acknowledge their achievements, discuss areas for growth, and align on next steps for their professional development. The PDP serves as a roadmap, and this final assessment marks an important milestone in their journey.

The last step in the process is signing the PDP, which confirms that you and your employee have met to review their performance. Once the PDP is ready for signature, you and your employee will receive an email notification. This final step ensures alignment on the review and sets the stage for continued success in the year ahead.





## 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. Meet with your employee to reflect on successes, address challenges, and identify key areas for further growth. Engaging in this discussion with your employee helps make sure their goals remain aligned with team objectives and university priorities.

Use this time to discuss which goals remain relevant and whether any should be adapted or continued into next year. Identify areas where additional support, training, or resources may be needed. By taking a proactive approach, you help ensure your employee's development aligns with team objectives and fosters long-term success.

## CONTINUING THE CONVERSATION COLLABORATING WITH YOUR EMPLOYEE

A successful PDP is built on collaboration. Take time to discuss your reflections and goals for the upcoming year with your employee. This conversation makes sure their objectives align with team priorities and that they have the necessary support to achieve them.

Regular check-ins throughout the year are a fundamental part of the PDP process and will help keep your employee's 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. Consistent conversations and tracking help create a dynamic development plan that evolves with their growth and contributions.

## HAVE QUESTIONS ABOUT YOUR PDP?

Whether you're looking to learn about the PDP process, or you're looking for a walk through of a specific step, you'll find a video to support. Take a peek at the PDP training videos.

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