

# CHQ PERFORMANCE MANAGEMENT

## PLANNING AND REVIEW FORM

Incumbent Name	
Designation	
Department/Discipline	
Manager/Supervisor Name	

### EXAMPLE OF A PERFORMANCE PLAN

#### 1. JOB GOAL

##### Purpose of Job

##### Example - Job Goal

“**Job Title**” = The Finance Accountant is responsible for

“**What**” =Supervising all company ledger entries and balances

“**Why**” = To provide an accurate record of company transactions and for the preparation of monthly, year-end and all statutory accounts.

#### 2. KEY PERFORMANCE INDICATORS

##### Performance to be delivered

##### Example - KPI

“**What**” & “**how**” performance is to be delivered

Ensure all accounting transactions are correctly recorded and updated by capturing journal entries accurately & timeously on the accounting system.

#### 3. PERFORMANCE STANDARDS

##### Measures of Performance

##### Example - Performance Standards

“**Quantitative**” - number, rate, output, expense, accuracy, timelines, percentages, e. g. **zero errors, within budget.**

“**Qualitative**” - description of behavior required, or steps in a procedure, eg. **According to prescribed procedures**

### RATINGS AND DESCRIPTORS

<b>P</b>	<b>Poor Performance</b>	Does not meet the required performance standards.
<b>E</b>	<b>Effective Performance</b>	Meets and sometimes exceeds required performance standards
<b>H</b>	<b>High Performance</b>	Consistently exceeds required performance standards
<b>EP</b>	<b>Exceptional Performance</b>	Demonstrates exceptional levels of performance



**PERFORMANCE PLANNING**

**PERFORMANCE REVIEW**

Job goal:

**REVIEW PERIOD 1**

**REVIEW PERIOD 2**  
(Cumulative for review period 1 & 2)

**REVIEW PERIOD 3**  
(Cumulative for review period 1, 2 & 3)

**Date:**

**Date:**

**Date:**

KPI 1

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

KPI 2

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

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Date:

Date:

Date:

**KPI 3**

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

**KPI 4**

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

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Date:

Date:

Date:

**KPI 5**

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

**KPI 6**

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

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# PERFORMANCE REVIEW

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Date:

Date:

Date:

Performance Standards:

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Rating:  P  E  H  EP

Comments:

Comments:

Comments:

Overall Rating:  P  E  H  EP

Overall Rating:  P  E  H  EP

Overall Rating:  P  E  H  EP

Comments:

Comments:

Comments:

Signature Incumbent:

Signature Incumbent:

Signature Incumbent:

Signature Incumbent

Signature Manager/Supervisor

Signature Manager/Supervisor:

Signature Manager/Supervisor:

# INDIVIDUAL DEVELOPMENT DISCUSSION

## Incumbent's Career Aspirations

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## If given a choice, state any preferences the incumbent may have regarding future employment within the company

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## Incumbent's attitude towards moves to other locations (where applicable)

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## Incumbent comments

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## Manager/supervisor comments

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# PERSONAL DEVELOPMENT PLAN

Competency to be developed	Development Plans	Target Date	Comments on development