

## Performance Development Plan

### Establishing a Performance Development Plan

A Performance Development Plan (PDP) is a way to give underperforming and or disengaged employees the opportunity to succeed while still holding them accountable for past performance. It is not always clear why an employee has poor performance. Until managers really allow for open dialogue and consistent feedback, the employee may not have really had the opportunity to be successful. A PDP may be a tool utilised by management to facilitate the addressing of performance issues but may not be appropriate to address significant deficiencies or behavioural issues.

#### Step 1: Summary of Performance Concerns

First document the employees' performance areas that need development. In documenting the main performance issues, be objective and specific. Provide facts and examples to further clarify the severity or pattern of performance concerns.

#### Step 2: Develop a summary of performance expectations/Action plan

The manager should establish an action plan for development. This action plan should include SMART goals.

S – Specific

M – Measurable

A – Attainable

R – Relevant

T – Timely

#### SMART goal examples

KEY OBJECTIVES <i>Key results to be attained during the next 3 month</i>	MEASURES OF SUCCESS <i>Quantitative and or Qualitative measure to evaluate results- To be completed when setting SMART Goals.</i>	RESULTS ACHIEVED <i>Achievements during the performance period – To be completed at end of PDP</i>
<b>This should be a short description of the goal – see examples below</b>	This should be short points detailing clearly achievable measures which will indicate success.	This should be discussed at PDP conclusion and goals achieved and measures undertaken to achieve them.
<b>Contribute with innovative ideas to your role in order to improve your function</b>	E.G. Keep record of meetings Produce status reports to keep issues update. Come prepared, be proactive, take initiative/ownership, and be creative/imaginative.	E.G. Joe Bloggs keeps a detailed record of all meetings. He has sent on weekly bulletin updates. A number of new initiatives have been undertaken such as changing window displays
<b>Keep Supervisor up to date with your progress</b>	E.G. Status report weekly; highlight any activities and issues. Summary status report due XXXX Be proactive, take initiative/ownership, be creative/imaginative	

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Consider if the employee may need any additional resources, training or coaching in order to meet these objectives. This action plan should clearly set performance expectations and should include a statement about the consequences for not meeting these objectives.

### Step 3: Develop Timeline and Review the PDP Draft

Prior to meeting with the employee, the manager should seek assistance from HR or their own Manager to review the PDP to ensure the documentation is stated clearly and without emotion. The third party can also review the suggested action plan to ensure it is specific, measurable, attainable and relevant within the PDP timeframe. The PDP timeframe should be no longer than 3 months.

### Step 4: Review the plan with the employee

During the meeting the manager must clearly lay out the areas for development and plan of action. The manager may need to modify the action plan after receiving the employee's input and feedback where doing so adds value or does not diminish the integrity of the plan. Make any changes to the plan before the manager and employee sign the PDP form. Be sure to follow up to obtain signatures once feedback is incorporated.

### Step 5: Follow up

The employee and manager should establish regular follow up meetings (weekly, bi-weekly or monthly). In these meetings, discuss and document progress toward objectives. Employees should be provided the opportunity in follow up meetings to ask questions and seek guidance or clarification on performance expectations. The manager should ensure any potential road blocks are discussed and that the employees been provided the necessary tools and training.

### Step 6: PDP Conclusion

In the PDP report the Results Achieved column should be completed by the manager. This will highlight where the employee has successfully met the goals set down as part of the PDP and where they have not met the goals.

If an employee fails to sufficiently improve, performance worsens, or the employee refuses to commit to the PDP the manager should consult HR regarding the next steps.

When an employee does show development but is unable to achieve some or all of their action plan objectives within a PDP timeline, depending on the nature of the development the manager may agree to extend the PDP for a few more weeks. (no longer than 6 weeks)

If it is determined that some of the objectives were not completely within the employee's control the manager may decide to either extend the PDP or end the PDP due to the progress that was observed.

When the employee has responded positively by meeting the objectives, the manager should formally close the PDP but will want to be sure the employee understands that continued good performance is expected.

The PDP should be retained in the HR file.

See next page for PDP Template.



## Performance Development Plan

Following each review meeting the reviewing Manager is required to forward a copy of this form **signed by both parties to the Human Resources Department** for retention on the employee's personnel file. If any further information is required please contact the Business Manager or Human Resources Department.

Employee Name		Position	
Manager Name		Pharmacy	

### Summary of Performance Concerns:

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### Summary of Performance Expectations/Action Plan:

[illegible]

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### Timeline for performance Development:

Failure to provide an immediate and sustained development in performance may result in disciplinary action up to and including termination of employment.

Signed: \_\_\_\_\_  
**Employee**

Date: \_\_\_\_\_

Signed: \_\_\_\_\_  
**Reviewing Manager**

Date: \_\_\_\_\_

Please send a copy of this to the Business Manager & or HR as appropriate

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### Declaration for completion at Final PDP Review Meeting

I \_\_\_\_\_ confirm that \_\_\_\_\_  
**Reviewing Manager** **Employee**

Has/ has not (*delete as appropriate*) successfully passed the PDP

6 week PDP Extension: Yes ☐

No ☐

Please send a copy of this to the HR Dept.

### Additional Comments:

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