

# Leadership Performance Planning and Evaluation Form

## Leadership Performance Management Form: Introduction

This is intended for performance planning and evaluation for leaders.

Leadership Performance management includes activities to ensure that goals are consistently being met in an effective and efficient manner that support the unit and organization's goals. The Leadership Performance Planning and Evaluation form is a method for tracking a leader's performance throughout the year. Organizational and Unit goals are often established during a strategic planning process. Performance management translates these goals to *results*, typically described in terms of quantity, quality, timeliness or cost. Goals should be SMART and demonstrate appropriate leadership competencies.

Another part of setting goals may be to prioritize, for example the percentage of time to be spent, or a numeric ranking with "1" as the highest. Your goals will need a measurement, information to evaluate the accomplishment of results. Measures are usually specified in terms of quantity, quality, timeliness or cost. We are also using the leadership competencies as a part of evaluating the results.

**Leadership Performance Planning and Evaluation Form**<http://www.med.umich.edu/umhshr/supervisor/performance-planning.html><http://www.med.umich.edu/umhshr/supervisor/performance-planning.html>

Performance Planning is not the same as the Professional Development Planning.

Please also refer to the following section on **giving performance feedback**

## Section 1: Introduction and Alignment

### *Introduction and Alignment*

The UMHS Leadership Performance Management form is intended to set goals for performance and for leadership development. As you plan for your goals, be sure they align with the institutional goals and your unit's goals.

## Section 2: Key Areas of Responsibility

### *Identifying Key Areas of Responsibility*

Key Areas of Responsibility (KARs) represent the bulk of your work, 80% or more. Your KARs come from your job description and assignments and will not change much from year to year unless you change jobs. They should be large pieces of your work, no more than five to seven. It is not a list of your tasks.

Examples can be found on the HR website ([Link](#)) .

### Section 3: Setting Performance Goals

#### ***Setting Performance Goals***

Goal setting is the foundation for success. Each year leaders should set performance goals with clear criteria for measuring success including the use of a relevant **leadership competency**. Competencies are measurable characteristics of a person that are related to their success at work and in accomplishing goals.

Changes in the workplace are happening more frequently. Your goals need to be flexible. Review and update your goals on a regular basis throughout the year.

Click [here](#) for more information on setting goals.

### Section 4: Leadership Competencies

#### **Form Section**

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#### ***Leadership Competencies***

Leadership Competencies are used as part of your performance evaluation criteria and they are also a part of your Professional Development Plan.

### Section 5: Professional Development Planning

#### **Form Section**

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#### ***Professional Development Planning***

Professional development generally refers to ongoing learning opportunities. Effective professional development is seen as increasingly vital to our organization's leadership development and succession planning. In addition to classes, professional development can include collaborative learning situations (shadowing), engagement in practical tasks, (meetings or committees), exploration of relevant subject matter (reading), and consistent feedback (coaching). You will continue to develop and engage your strengths in your work, as well as your areas for growth and development.