

# Performance Management and Development Plan

Name:

Position:

Date:

Manager/Supervisor:

Appraisal Period:

Department:

From:

To:

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## Individual Performance Factors

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**Safety:** Consider employee's conformance to safety requirements. Consider the employee's willingness to lead or participate in safety training and discussions. Consider the employee's safety record.

*Check one please:*

- ☐ Consistently achieves results that meet and frequently surpass objectives. Develops innovative/value added ideas. Requires minimal technical and supervisory guidance. Results as a whole set the individual above the results typically achieved by peers.
- ☐ Rarely falls short and sometimes exceeds objectives. Independently develops ideas. Requires a normal amount of technical and supervisory guidance. Results achieved by the individual fully satisfy objectives.
- ☐ Too often results fall short of satisfying objectives. May require increased levels of technical and/or supervisory guidance. Results achieved by the individual do not fully satisfy objectives.

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## Performance Objectives

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**Results:** List the objectives important to fully satisfying the responsibilities of the position. Include objectives that are required to fulfill the ongoing (day-to-day) responsibilities of the position, as well as objectives that add value, enhance results, and generally improve the products (output) produced. Develop a minimum of five (maximum of eight) objectives. Objectives should be specific, measurable, achievable, compatible, and consistent with TMK IPSCO's processes and goals. Include milestones and timing.

*Check one please:*

- ☐ Consistently achieves results that meet and frequently surpass objectives. Develops innovative/value added ideas. Requires minimal technical and supervisory guidance. Results as a whole set the individual above the results typically achieved by peers.
- ☐ Rarely falls short and sometimes exceeds objectives. Independently develops ideas. Requires a normal amount of technical and supervisory guidance. Results achieved by the individual fully satisfy objectives.
- ☐ Too often results fall short of satisfying objectives. May require increased levels of technical and/or supervisory guidance. Results achieved by the individual do not fully satisfy objectives.

Objective 1 Description:	
Objective 2 Description:	
Objective 3 Description:	
Objective 4 Description:	
Objective 5 Description:	
Objective 6 Description: (optional)	
Objective 7 Description: (optional)	
Objective 8 Description: (optional)	
Overall Comments on Performance Objectives:	

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### Individual Competencies

**Job Knowledge:** Consider the extent to which the employee demonstrates a command of the knowledge essential to fulfilling the duties of the position and applies that knowledge to develop better and more efficient ways of completing job responsibilities.

*Check one please:*

- ☐ Complete understanding of the job as well as related areas. A self-starter who employs knowledge and independently finds ways to add value by producing improved results and/or more efficient processes.
- ☐ A solid command of job related knowledge. Employs knowledge to produce fully satisfactory results with normal guidance and assistance.
- ☐ Does not demonstrate full command of job related knowledge required to fulfill responsibilities and produce satisfactory results. Frequently requires additional guidance and assistance to complete assignments.

**Judgment/Problem Solving:** Consider the employee's ability to use sound business judgment and demonstrate the courage to take action where and when needed.

*Check one please:*

- ☐ Decisions/recommendations reflect thorough analysis and rarely require corrections. Possesses a high level of maturity, acumen, and common sense.
  - ☐ Able to make timely decisions and recommendations that are usually correct and seeks out additional input as appropriate.
  - ☐ May present questions and problems rather than solutions. Requires additional assistance and guidance in this area.
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**Planning and Organizing:** Consider the success in continuously developing and revising plans which result in well-organized approaches to job responsibilities and reflect the ability to rapidly adapt to changes in work content and environment.

*Check one please:*

- ☐ Well organized; independently plans and prioritizes responsibilities and demonstrates excellent control of processes and result. Develops plans to integrate with related functions/departments. Reliable; achieves on time, or in some cases ahead of schedule, results. Perceives and adapts to new conditions often before the actual changes impact the work environment.
- ☐ Plans and organizes work satisfactorily with normal input and guidance. Adapts well and supports change by making required adjustments to plans and priorities. Can be relied upon to achieve on time results.
- ☐ Frequently requires additional guidance and direction to plan and organize responsibilities. Typically misses too many deadlines. May have trouble grasping and adapting to changes in responsibilities and the work environment.

**Communication Skills:** Consider the employee's ability to provide timely and concise information to others using clear and thoughtful oral and written communications to influence, negotiate, and collaborate effectively.

*Check one please:*

- ☐ Exceptional skill in presenting ideas and providing information in both oral and written formats.
- ☐ Good oral and written presentation of information. Can be relied upon to clearly transmit all necessary information.
- ☐ Oral and written information may not be well organized and clearly presented. May fail to communicate some important information.

**Teamwork/Customer Service:** Consider the employee's attitude and ability to interface with coworkers, internal and external customers. Also, consider the contributions the employee makes in meetings and team assignments.

*Check one please:*

- ☐ Always congenial and helpful to others, cooperative in completing tasks and an excellent team player. Initiates efforts to assure all communications are clear and concise. Seeks out input from internal and external customers to assure their needs are satisfied. Considers all stakeholders' perspectives in developing solutions to issues.
- ☐ A valued team member who understands the value of clear concise communication. Identifies internal and external customers and works to satisfy their needs. Listens well and considers all stakeholders stated needs in issue resolution.
- ☐ Is not always quick to see the needs of support teams and other internal and external customer. May from time to time require additional guidance to interface effectively with other. May not always seek out, recognize or appropriately value needs of all stakeholders in issue resolution.

**Dependability:** Consider the responsibility assumed by the employee for his/her actions. An additional consideration is the employee's attendance.

*Check one please:*

- ☐ Always meets deadlines and keeps commitments. Rarely misses work or meetings. Can be relied upon to meet deadlines.
- ☐ Completes assignments on time and has a solid record of attendance and arrives at meetings on time.
- ☐ Misses too many deadlines. Attendance may not be up to expected standards. May be late or miss scheduled meetings. Requires additional supervision to assure work is being performed and completed on time.

Overall Comments on  
Individual Competencies:

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**\*\*If the person being evaluated supervises or manages other employees, continue to the section below, Leadership Competencies, otherwise, bypass this section and complete the Evaluation Summary.\*\***

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## Leadership Competencies

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*Check one please:*

**Leadership:** Consider the supervisor's ability to provide unity of purpose, decisiveness, and direction to the work team. Also, consider the supervisor's passion for their work, their encouragement of employees to strive for excellence and their delivery on commitments to their team members and customers.

*Check one please:*

☐ Instinctively assumes the leader's role. Instills respect and confidence in employees and work teams. Confidently inspires team members to put forth their best effort and develops loyalty and mutual respect within the work team. Demonstrates ability to enlist employee engagement and employs additional motivational techniques, as situations require.

☐ Accepts the leadership role. Develops mutual respect with employees and work teams. Provides team members with direction and a sense of purpose. Assures that the work team achieves results that meet objectives. Develops a good working relationship with team members.

☐ Does not satisfactorily fulfill the leadership role. Team members may lack confidence and cohesiveness. Team members may have sense of being left on their own too much. The results achieved by the work team may be disjointed and incomplete.

**Management and Execution:** Consider the manager's ability to lead work groups, establish priorities, provide required training and manage resources to assure assignments are completed on time and within budget.

☐ Issues clear unambiguous guidance, anticipates the need to assist employees in problem resolution and adjust staffing and other resources as required. Assures the team functions cohesively. Assignments are completed on time and within budget. Results achieved frequently exceed business plan objectives.

☐ Develops sound plans and clearly communicates with employees. Is available to assist employees with problem solving. Demonstrates good control of staffing and other resources. Works with staff to keep them on task and motivated. Results generally meet business plan objectives.

☐ Plans and instructions may be incomplete and unclear. Sufficient communication with employee may not be provided resulting in employee confusion and schedule delays. Required resources may not always be provided in time to meet requirements. Employees may also display low morale and frustration as a result of the confusion in their work environment. Business plans are not consistently met.

**Employee Relations:** Consider the supervisor's effectiveness in coaching, counseling, and motivating employees.

*Check one please:*

☐ Consistently maintains an atmosphere that encourages individual excellence and maximum team effort. Assures employees receive consistent and equitable treatment. Demonstrates thorough knowledge of company policies and applies them consistently. Highly proficient in the use of the TMK IPSCO Performance Management & Development Program to access, reward, and develop employees. Rarely misses performance review due dates.

☐ Maintains employee moral and promotes team efforts. Treats employees consistently and equitably. Has a good working knowledge of company policies and their application. Fully capable of using the TMK IPSCO Performance Management & Development Program to access, reward, and develop employees. Generally completes performance reviews on time.

☐ Employees do not display an acceptable level of morale and team performance. Employees may not feel that they are treated fairly and with respect. The supervisor may not demonstrate an acceptable level of familiarity with company policies and their application. Not proficient in the use of the TMK IPSCO Performance Management & Development Program to access, reward, and develop employees. Too often misses performance review due dates.

Overall Comments on  
Leadership Competencies:

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## EVALUATION SUMMARY

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**Summary:** Rate this employee's overall performance. Carefully weigh each of the above results and competencies. Consider the relative importance of each result and competency to the present job. Be objective. *Check one please:*

- ☐ **Outstanding** – Unique, exceptional accomplishments that are obviously very far above what is required and which relatively few employees would be expected to achieve.
- ☐ **Well Above Expectations** - Consistently exceeds job requirements.
- ☐ **Meets Expectations** - Fulfills all job requirements.
- ☐ **Needs Improvement to Reach Expectations** – Does not meet minimum expectations of the job on a consistent basis.
- ☐ **Unsatisfactory** – Unable to meet job requirements.

**Development:** The majority of an employee's development is gained through on-the-job experiences therefore development plans should be heavily weighted towards on-the-job coaching, mentoring, and special assignments. Additional career development can be fostered by assigning employees to special projects such as making a presentation, managing a project, or other assignments, which reach beyond the scope of the employee's current position. Formal training and/or education may also be included to provide the employee the technical basis for future growth. (For example: Bachelor's degree, Professional certifications, skills development – Microsoft training courses, etc.)

	Employee Actions	Supervisor Actions
3 Months		
6 Months		
Future - Years		

### APPROVALS:

**Appraisal Prepared by:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Supervisor's Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Reviewed by** (2<sup>nd</sup> level supervisor) \_\_\_\_\_ **Date:** \_\_\_\_\_

**HR Director:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Comments:** \_\_\_\_\_

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