



University Life
Professional Development & Performance Plan
Administrative/Professional Faculty & Classified Staff

Overview:

The UL Professional Development and Performance Plan details SMART performance goals, outlines what the employee is expected to accomplish, and how the employee will do so during the current performance cycle. The plan is to be updated annually at the start of the performance cycle, in accordance with the timeline provided by George Mason University Human Resources.

Performance Actions (the how) and outcomes (the what) should be developed based on the employee's key responsibilities (located in their position description), standards of professional practice, and professional development goals. Developing the performance plan is to be a collaborative effort between the employee and supervisor involving discussion, review, and revision. The final plan should reflect agreed upon understandings and expectations of how the employee will carry out his or her key responsibilities and the results to be achieved.

Monitoring Performance Plan progress:

The Performance Plan is a living document that should be updated regularly during the performance management cycle. Progress is to be documented and discussed. This includes but is not limited to:

- One on one meetings between the employee and supervisor.
- Quarterly meetings to discuss the progress and status of the goal development and work are to occur and should be detailed in the document's dedicated section.

At the end of the performance cycle, the Performance Plan should be addressed in the employee's performance self-appraisal and in the performance evaluation completed by the supervisor. There are templates for a meeting agenda for quarterly meeting discussions as well as monthly report that includes goal progression at: <https://hr.gmu.edu/performance-evaluations/performance-evaluation-resources/> and <https://ulprofdev.gmu.edu/resources/supervision/>

Note:

- Performance goals, actions and outcomes may be changed during the performance cycle. This would occur when the employee and supervisor agree change is appropriate.
- Performance goals, actions and outcomes can also be carried forward from one performance cycle to the next.
- Performance goals, actions and outcomes that arise from unexpected opportunities during the performance cycle may also be added.

Purpose:

The UL Professional Development & Performance Plan allows staff to articulate their goals and Actions for that year's performance cycle. This document allows the employee and supervisor to communicate shared goals, progress and challenges of their work both in the plan and in the progress meetings. With ongoing conversations between the employee and supervisor, the Performance Plan will serve as a living document that allows focus on professional practice, growth and contribution, as noted above. Staff plans allow for unit leaders to map team members' work to the unit goals and up to the divisional goals.

Performance Plan Form:

The Performance Plan document includes the components defined in a clear and simple format. A supervisor and employee or department may include additional components, if deemed important and in doing so facilitates the performance planning process. The most crucial element of the performance plan is its usefulness to the supervisor and employee in the planning and review of work and performance.

NOTE: Examples of additional components that some have used in the past: "Key Resources Needed" and "Measures Used" and "Alignment to Unit Goals."

Performance Plan Progress Conversations:

The ongoing conversations between the employee and supervisor are the cornerstone of the successful implementation of the Performance Plan. The progress notes section of the Performance Plan allows the employee to detail progress in the written plan in preparation for periodic discussion with their supervisor. The employee may also identify key resources needed to achieve success and identify challenges, successes, and collaborators in the process.

Resources to support the employee and supervisor are included below in the Resource Section.

Definition of Terms:

| | |
|---------------------------------------|--|
| Essential Function: | Inserted from the employee position description. Your employee position description is accessible to you via your supervisor. |
| Performance Goal: | SMART goal corresponding to the Essential Function or professional development competency |
| Professional Development Goal: | At least one professional development goal will be focused on an ACPA/NASPA professional competency; the other professional development goal(s) will focus on an area of growth for improvement |
| Actions: | The means by which the goal will be achieved (how); the specific actions that will be taken to achieve the goal |
| Outcome: | The specific result(s), achieved through the objective, that demonstrate fulfillment of the goal; must be observable and measurable |
| % Of Time | Estimate of amount of time to be allocated to each objective |
| Progress Notes | Detail progress in the written plan as preparation for quarterly discussions with supervisor <ul style="list-style-type: none"> • Identify key resources needed • Identify challenges, hurdles, successes, and collaborators |

Resources:

[LinkedIn Learning: Setting Team and Employee Goals Using SMART Methodology](#)

[Action Words for Performance SMART Goals](#)

[Mason HR Performance Management Goals and Actions resources](#)

[Tips for Holding Meaningful Conversations](#)

| | | |
|-------------------|-------------------------|--------------------------------------|
| Name: | | |
| Job Title: | Position Number: | Performance Plan Time Period: |

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| PERFORMANCE GOALS |
| DESCRIPTION OF SECTION AND GUIDANCE Performance goals are derived from the employee's key responsibilities, which are detailed in the position description. |

| | | |
|---|--|---|
| Essential Function #1 <i>(from Position Description):</i> | | |
| Performance Goal | | |
| Action Plan: <i>How you will accomplish the work in the smart goal</i> 1.1 1.2 1.3 | Outcomes: <i>The results you aim to accomplish; what you want to achieve; must be measurable</i> 1.1 1.2 1.3 | % of time spent weekly & strategy for work time allocation: <i>How will you manage your time and work to create time to work on this goal.</i> 1.1 1.2 |
| Progress Notes: <i>Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.</i> | | |
| June 30 quarterly check-in | | |
| September 30 quarterly check-in | | |

January 2 quarterly check-in

Essential Function #2 (from Position Description):

Performance Goal:

Action Plan: How you will accomplish the work in the smart goal

1.1

1.2

1.3

Outcomes: The results you aim to accomplish; what you want to achieve; must be measurable

1.1

1.2

1.3

% of time spent weekly & strategy for work time allocation: How will you manage your time and work to create time to work on this goal.

1.1

1.2

Progress Notes:

Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.

June 30 quarterly check-in

September 30 quarterly check-in

January 2 quarterly check-in

Essential Function #2 (from Position Description):

| | | |
|---|--|---|
| Performance Goal | | |
| Action Plan: <i>How you will accomplish the work in the smart goal</i> 1.1 1.2 1.3 | Outcomes: <i>The results you aim to accomplish; what you want to achieve; must be measurable</i> 1.1 1.2 1.3 | % of time spent weekly & strategy for work time allocation: <i>How will you manage your time and work to create time to work on this goal.</i> 1.1 1.2 |
| Progress Notes: <i>Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.</i> | | |
| June 30 quarterly check-in | | |
| September 30 quarterly check-in | | |
| January 2 quarterly check-in | | |

| | | |
|---|--|--|
| Essential Function #4 (from Position Description): | | |
| Performance Goal | | |
| Action Plan: <i>How you will accomplish the work in the smart goal</i> 1.1 1.2 | Outcomes: <i>The results you aim to accomplish; what you want to achieve; must be measurable</i> 1.1 | % of time spent weekly & strategy for work time allocation: <i>How will</i> |

| | | |
|---|------------|---|
| 1.3 | 1.2 1.3 | <i>you manage your time and work to create time to work on this goal.</i> 1.1 1.2 |
| Progress Notes: <i>Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.</i> | | |
| June 30 quarterly check-in | | |
| September 30 quarterly check-in | | |
| January 2 quarterly check-in | | |

| | | |
|---|--|---|
| Essential Function #5 <i>(from Position Description):</i> | | |
| Performance Goal | | |
| Action Plan: <i>How you will accomplish the work in the smart goal</i> 1.1 1.2 1.3 | Outcomes: <i>The results you aim to accomplish; what you want to achieve; must be measurable</i> 1.1 1.2 1.3 | % of time spent weekly & strategy for work time allocation: <i>How will you manage your time and work to create time to work on this goal.</i> 1.1 1.2 |
| Progress Notes: <i>Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.</i> | | |
| June 30 quarterly check-in | | |
| September 30 quarterly check-in | | |
| January 2 quarterly check-in | | |

PROFESSIONAL DEVELOPMENT GOALS

At least one professional development goal is to be focused on professional competency development. Please reference the ACPA/NASPA competencies list, description and levels. Additionally, there is the ACPA/NASPA Professional Competencies Rubric to determine level and development. If your area has a set of association competencies, those can be a focus for goal #2.

- https://www.naspa.org/images/uploads/main/ACPA_NASPA_Professional_Competencies_FINAL.pdf
- https://www.naspa.org/images/uploads/main/ACPA_NASPA_Professional_Competency_Rubrics_Full.pdf

The other professional development goals can be focused on competency development, or another area of focus for the staff members.

Professional Development Goal #1: [ACPA/NASPA Competency/Level development](#)

- ☐ Foundational
☐ Intermediate
☐ Advanced

Action Plan: How you will accomplish this professional development goal

Outcomes: The results you aim to accomplish; what you want to achieve; must be measurable

% of Time: Estimate of amount of time to be allocated to this objective

Progress Notes: *Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why.*

June 30 quarterly check-in

September 30 quarterly check-in

January 2 quarterly check-in

| Professional Development Goal #2 | | |
|---|--|--|
| Actions: How you will accomplish this professional development goal | Outcomes: The results you aim to accomplish; what you want to achieve; must be measurable | % of Time: Estimate of amount of time to be allocated to this objective |
| Progress Notes: Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why. | | |
| June 31 quarterly check-in | | |
| September 31 quarterly check-in | | |
| January 2 quarterly check-in | | |

| Professional Development Goal #3 | | |
|---|--|--|
| Actions: How you will accomplish this professional development goal | Outcomes: The results you aim to accomplish; what you want to achieve; must be measurable | % of Time: Estimate of amount of time to be allocated to this objective |
| Progress Notes: Please include information that indicates updates, progress, challenges, needs, etc. It is important to indicate if you are on track according to your timeline and action plan; are you delayed or paused, or at a complete stop and why. | | |
| June 30 quarterly check-in | | |

| |
|---------------------------------|
| September 30 quarterly check-in |
| January 2 quarterly check-in |

Supervisor Signature: _____ Date: _____

Employee Signature: _____ Date: _____

Professional Development/Performance Management Resource Guide

Review the list below and utilize it as a potential resource when considering ideas for your professional staff development plans.

| | | |
|--|--|---|
| <input type="checkbox"/> Assessment | <input type="checkbox"/> Building Employee Fulfillment | <input type="checkbox"/> Collaboration |
| <input type="checkbox"/> Program Planning | <input type="checkbox"/> Conducting Meetings | <input type="checkbox"/> Conflict Resolution |
| <input type="checkbox"/> Advising Students | <input type="checkbox"/> Creativity | <input type="checkbox"/> Curriculum Development |
| <input type="checkbox"/> Crisis Management | <input type="checkbox"/> Customer Service | <input type="checkbox"/> Decision Making |
| <input type="checkbox"/> Delegation | <input type="checkbox"/> Developing Vision | <input type="checkbox"/> Effective Supervision |
| <input type="checkbox"/> Ethics and Integrity | <input type="checkbox"/> External/Media Relations | <input type="checkbox"/> Faculty/Staff Teams |
| <input type="checkbox"/> Budget Management | <input type="checkbox"/> Fundraising | <input type="checkbox"/> Getting Organized |
| <input type="checkbox"/> Goal Setting | <input type="checkbox"/> Grant Writing | <input type="checkbox"/> Key HR Policies |
| <input type="checkbox"/> Leading Change | <input type="checkbox"/> Program Evaluation | <input type="checkbox"/> Leadership |
| <input type="checkbox"/> Listening Skills | <input type="checkbox"/> Legal Issues in Student Affairs | <input type="checkbox"/> Managing Ambiguity |
| <input type="checkbox"/> Managing Differences | <input type="checkbox"/> Multicultural Competencies | <input type="checkbox"/> Oral Communication |
| <input type="checkbox"/> Pedagogy | <input type="checkbox"/> Performance Evaluation | <input type="checkbox"/> Problem Solving |
| <input type="checkbox"/> Progressive Discipline | <input type="checkbox"/> Professional Writing | <input type="checkbox"/> Public Speaking |
| <input type="checkbox"/> Relating to Students | <input type="checkbox"/> Research Techniques | <input type="checkbox"/> Strategic Planning |
| <input type="checkbox"/> Team Building | <input type="checkbox"/> Technology | <input type="checkbox"/> Time Management |
| <input type="checkbox"/> University Policies | <input type="checkbox"/> Professional Certifications | <input type="checkbox"/> Professional Licensure |
| <input type="checkbox"/> Collaborating with academic units | <input type="checkbox"/> Learning and Developmental Theories | <input type="checkbox"/> Collaborating with Instructional Faculty |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |