

Notes on Performance Review Templates

The following templates are designed to provide a basis for setting of objectives for various levels of planner competence. These can be utilised in conjunction with a planner competence matrix (same author) to help guide performance and personal development while benefitting defined business goals. This is not designed to be a complete list, but as an indicator of areas where objectives may be set.

Each objective is broken into a number of success measures; each success measure should then have a deadline and stretch target date assigned to it. This method of splitting down objectives is considered to be good practice, since it allows for general objectives with specific goals, as per SMART process.

Using a standard form for each grade allows the manager to compare individual performance more easily, while still leaving room for individual growth and learning requirements. It therefore supports the use of a competence matrix, but does not entirely rely on using same. Team members should also find this useful, since it clarifies career development needs, potentially within a larger training matrix.

	Objective	Area	Success Measures	Timescale	Stretch Target Timescale
1	Conduct one safety moment at team meeting	Value	Safety moment complete Presentation used submitted to Planning Manager as record		
2	Complete Stage Gate One	Business	Present to Project Services management team Average of scores within competent range as minimum		
3	Complete Stage Gate Two	Business	Demonstrate practical application of learning through production of report Achieve competent grade for report as minimum		
4	Complete Stage Gate Three	Business	Complete three months as tender planner, working to AM instruction Complete three months as DSVi planner, working to SMcN instruction Demonstrate satisfactory performance through completed feedback forms from Project Managers & lead planners		
5		Development			
6					

	Objective	Area	Success Measures	Timescale	Stretch Target Timescale
1	Conduct one safety moment at team meeting	Value	Safety moment complete Presentation used submitted to Planning Manager as record		
2	Assist development of UK Planning SOP	Business	Attend & contribute to team sessions Complete agreed work arising		
3	Ensure project planning performance meets business requirements	Business	PM appraisal		
4	Complete Route To Competence Matrix	Business	Complete Route To Competence Matrix		
5	Ensure all project schedules are weatherised	Business	Complete weatherisation tool training Apply weatherisation tool to existent projects Ensure compliance with all projects		
6	Comply with & support ProArc rollout schedule	Business	Attend ProArc Planner training in line with roll-out schedule Ensure that UK Planning supports ProArc implementation on each project within rollout schedule timescales		
7		Development			
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5	Ensure all project schedules are weatherised	Business	Complete weatherisation tool training Apply weatherisation tool to existent projects Ensure compliance with all projects		
6	Comply with & support ProArc rollout schedule	Business	Attend ProArc Planner training in line with roll-out schedule Ensure that UK Planning supports ProArc implementation on each project within rollout schedule timescales		
7	Mentor Associates on DSVi	Development	Hand over DSVi to Associate for 3 month block Manage their day to day activities Complete feedback form to demonstrate competence of Associate Performance		

	Objective	Area	Success Measures	Timescale	Stretch Target Timescale
1	Conduct one safety moment at team meeting	Value	Safety moment complete Presentation used submitted to Planning Manager as record		
2	Understand Tendering Team bid requirements	Business			
3	Develop UK Planning Tender SOP	Business			
4	Present training tool to Project services	Business	Present cost benefit analysis of tool to senior PS team		
5	Complete & utilise as appropriate weather tool in schedules	Business	Complete weatherisation tool training Apply weatherisation tool to large tender projects Ensure compliance with large tender projects		
6	Complete Route To Competence Matrix	Business	Complete Route To Competence Matrix		
7	Complete ProArc Training	Development			

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3	Ensure project planning performance meets business requirements	Business			
4	Complete Route To Competence Matrix	Business	Complete Route To Competence Matrix		
5	Ensure all project schedules are weatherised	Business	Complete weatherisation tool training Apply weatherisation tool to existent projects Ensure compliance with all projects		
6	Comply with & support ProArc rollout schedule	Business	Attend ProArc Planner training in line with roll-out schedule Ensure that UK Planning supports ProArc implementation on each project within rollout schedule timescales		
7	Enhance UK Planning Reputation	Business			
8	Train in Pertmaster / Primavera Risk Analysis tool	Development	Complete training course Carry out schedule risk analysis at rolled-up and full schedule levels		

	Objective	Area	Success Measures	Timescale	Stretch Target Timescale
1	Conduct one safety moment at team meeting	Value	Safety moment complete Presentation used submitted to Planning Manager as record		
2	Take leading roll in development of UK Planning SOP	Business	Lead & contribute to team sessions Complete agreed work arising Review other teams' work as appropriate Assist Planning Manager in linking of individual WIs / processes etc to coherent whole		
3	Ensure project planning performance meets business requirements	Business			
4	Complete Route To Competence Matrix	Business	Complete Route To Competence Matrix		
5	Ensure all project schedules are weatherised	Business	Complete weatherisation tool training Apply weatherisation tool to existent projects Ensure compliance with all projects		
6	Comply with & support ProArc rollout schedule	Business	Attend ProArc Planner training in line with roll-out schedule Ensure that UK Planning supports ProArc implementation on each project within rollout schedule timescales		
7	Share knowledge to upskill team	Business	Identify competency shortfall within mentor group Agree plan to resolve Provide evidence of improvement in mentoree		

			understanding & application		
8	Enhance UK Planning Reputation	Business			
7	Train in Pertmaster / Primavera Risk Analysis tool	Development	Complete training course Carry out schedule risk analysis at rolled-up and full schedule levels		
6					