

Navigating the Professional Impact and Development Process

Contents

Introduction.....	2
Purpose of This Guide	2
Purpose of the Professional Impact and Development Framework	2
Benefits of the Professional Impact and Development Framework	3
Overview of the Professional Impact and Development Process.....	4
The Professional Impact and Development Cycle	4
Roles and Responsibilities	8
How to Create a Professional Impact and Development Plan	9
How to align objectives and goals	9
How to set SMART goals.....	11
How to create Personal Development and Learning Plans (PDLPs)	13
How to Conduct Performance Reviews	15
How to Conduct Performance Reviews: A Step-by-Step Checklist	18
Performance Ratings	21
How to recognize various levels of performance	212
How to address poor performance	25
Frequently Asked Questions	28
Appendix A Professional Impact and Development Timelines	34
Appendix B Health PEI Vision, Mission and Values	35
Appendix C Sample of a Professional Impact and Development Form.....	36

Introduction

Purpose of This Guide

This guide supports excluded leaders in setting effective goals aligned with Health PEI's strategic plan, establishing meaningful professional development objectives, and engaging in regular conversations to support progress.

In it you will find tips, checklists, and other resources to help you navigate the professional impact and development process.

If you have any questions about this guide, contact the Learning & Development team by emailing learning@ihis.org. For support with the Professional Impact and Development process contact your human resources manager.

Purpose of the Professional Impact and Development Process

The Professional Impact and Development process ensures alignment between individual, team, and organizational goals. It provides a structured approach to setting expectations, tracking progress, and supporting leadership development across Health PEI while providing clear accountability for outcomes.

Grounded in the LEADS framework, the process helps leaders set clear goals, provide meaningful feedback, and develop talent to drive results and organizational success. It aligns individual contributions with organizational priorities, strengthens leadership accountability, and fosters a culture of growth and excellence.

TERMS USED IN THIS GUIDE

Manager: the leader conducting the review regardless of their job title.

Employee: the person receiving the review regardless of their job title or status as a contracted or permanent staff member.

Year: fiscal year (April 1 to March 31)

Professional Impact and Development Form (PIDF): the form used to document the professional impact and development cycle

Impact: the difference an employee is making through their performance

Personal Development and Learning Form (PDLP): the Part of the PIDF used to document learning & development needs and goals

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Benefits of the Professional Impact and Development Process	
Health PEI	<ul style="list-style-type: none">• Aligns vision, values, and operations• Builds a culture of accountability and high performance• Reduces leadership risk• Supports diversity and inclusion• Strengthens retention and succession planning
Managers	<ul style="list-style-type: none">• Clarifies strategic priorities and team alignment• Enhances coaching and feedback skills• Builds trust through open dialogue• Identifies leadership potential• Informs resource and talent decisions
Employees	<ul style="list-style-type: none">• Clarifies expectations and priorities• Provides actionable feedback for growth• Opens career development opportunities• Increases engagement and motivation• Encourages ownership and improvement

Overview of the Professional Impact and Development Process

The Professional Impact and Development Cycle

The professional impact and development cycle includes the following interconnected stages:



For the 2025–26 fiscal year, the cycle begins with annual planning in October and November 2025, followed by a quarterly check-up in January 2026, and an annual review in March 2026.

For subsequent fiscal years, the cycle will begin with annual planning in March and April, include quarterly check-ups in July, October, and January, and conclude with an annual review at the end of the fiscal year in March.

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The Professional Impact and Development Form (PIDF)

The employee and manager document this cycle in a Professional Impact and Development Form (PIDF). **There are separate forms for chief executives, executive directors, directors and hospital administrators, and managers.** These forms are available on the [Professional Impact and Development page](#) on the Staff Resource Centre.

The manager and employee will use the same PIDF throughout the year – each should have access to the same copy. At the end of the fiscal year, the manager sends a signed hardcopy in a sealed envelope to the employee’s human resources manager.

This PIDF has five parts:

1. Employee information
2. Objectives
3. LEADS Capabilities Evaluation
4. Personal Development and Learning Plan
5. Annual Employee and Manager Feedback

View a sample of a PIDF at the end of this guide.

Steps in the Professional Impact and Development Cycle

1. Annual Planning

Time: April or when new employee joins your team (for the 2025-26 fiscal year, complete your plan by November 28, 2025.)

At the start of the fiscal year, the manager and employee start a new PIDF.

Task	Employee	Manager
Meet to set strategic objectives and aligned SMART goals for the upcoming fiscal year and record them in Part 2 of the PIDF.	✓	✓
Review the LEADS capabilities in Part 3 of the PIDF.	✓	
Create a Personal Development and Learning Plan in Part 4 of the PIDF.	✓	

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Task	Employee	Manager
Schedule quarterly check-ins in July, October & January.	✓	✓

2. Quarterly check-ins and ongoing monitoring

Time: July, October and January (for the 2025-26 fiscal year, have your quarterly check-in in January 2026.)

Quarterly check-ins in July, October and January calibrate progress and help prepare for year-end final reviews.

Task	Employee	Manager
Meet to update the percentage of each goal achieved in Part 2 of the PIDF. Comment on activities pursued and/or updated or changed goals	✓	✓
Provide one or two examples of how the employee has demonstrated each LEADS capability in their work in Part 3 of the PIDF.	✓	
Comment on the employee's proficiency with each LEADS capability in Part 3 of the PIDF.		✓
Note progress toward personal development and learning goals and add any new goals to Part 4 of the PIDF.	✓	

Between quarterly meetings:

The employee and manager should regularly monitor progress toward goals in monthly or more frequent one-on-ones and/or team meetings. When required, the employee should ask for support, feedback or coaching.

Consistent communication ensures there are no surprises in the year-end review.

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3. Year-end Review and Ratings

Time: March

A formal year-end review captures and summarizes the year's achievements.

Task	Employee	Manager
Update the percentage of each goal achieved in Part 2 of the PIDF. Comment on activities pursued and/or updated or changed goals.	✓	✓
Rate the employee's performance in meeting each objective in Part 2 of the PIDF.		✓
Rate personal performance on each of the LEADS capabilities in Part 3 of the PIDF.	✓	
Rate the employee on each of the LEADS capabilities in Part 3 of the PIDF.		✓
Update the Personal Development and Learning Plan in Part 4 of PIDF.	✓	
Rate the employee's overall performance for the fiscal year in Part 5 of the PIDF.		✓
Summarize thoughts on the employee's performance, growth and impact over the year in Part 5 of the PIDF.	✓	✓
Send a hardcopy of the signed PIDF in a sealed envelope to the employee's human resources manager.		✓

See Appendix A for a visual timeline of the Professional Impact and Development process.

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Roles and Responsibilities

Manager: Enabler	Employee: Performance Driver	People and Professional Practice: Process Owner
<p>Meet with employees according to selected cadence (for example, monthly one-on-ones) in addition to annual planning, review and quarterly check-ins.</p> <p>Set expectations and goals with their employees.</p> <p>Provide regular performance feedback and coaching.</p> <p>Apply ratings fairly.</p> <p>Identify, develop, and appropriately manage poor performance in a timely manner.</p> <p>Identify and appropriately recognize exceptional performance.</p>	<p>Own the process by requesting or booking formal check-ins and informal meetings with their leader.</p> <p>Work closely with their manager to understand expectations of the role.</p> <p>Identify goals that support organizational goals.</p> <p>Discuss accomplishments, progress against goals, and challenges.</p> <p>Integrate feedback and coaching tips to improve their performance.</p> <p>Keep manager apprised of status of goals and ask for support as needed.</p>	<p>Support and communicate the professional impact and development framework.</p> <p>Provide information and resources on the professional impact and development framework.</p> <p>Audit the process to solicit feedback.</p> <p>Update framework and supporting tools as needed.</p> <p>Coach leaders on how to apply ratings.</p>

How to Create an Annual Plan

At the start of the fiscal year (in April), the manager and employee collaboratively set the employee’s objectives and goals for the upcoming fiscal year in Part 2 of the PIDF.

Some managers might ask their employees to write their objectives and goals in their PIDFs first, submit them for review, and then finalize them in the planning meeting. Others might prefer to do this entire process together in an extended meeting.

Aligning objectives and goals

All objectives and goals should align with the organization’s highest priorities.

<p>Strategic Plan Objective</p> 	<p>A pillar, objective or goal from:</p> <ul style="list-style-type: none"> • Health PEI Strategic Plan • The Health PEI Business Plan or • A mandate letter
<p>Business or Operational Plan Objective</p> 	<p>The part of the above objective that the area you lead is responsible and accountable for.</p> <p>For example:</p> <ul style="list-style-type: none"> • a supporting goal from one of the documents above • An objective or goal from a departmental business or operational plan • an initiative contributing to the achievement of the strategic plan objective above
<p>SMART Goals</p>	<p>How you will achieve the Business or Operational Plan Objective.</p> <p>For example:</p> <ul style="list-style-type: none"> • a new or updated process, project, program or policy • resource allocations such as updating budgets, hiring staff, or acquiring equipment • capacity-building efforts such as training or developing tools and systems <p>See page 11 for more information on how to set SMART Goals.</p>

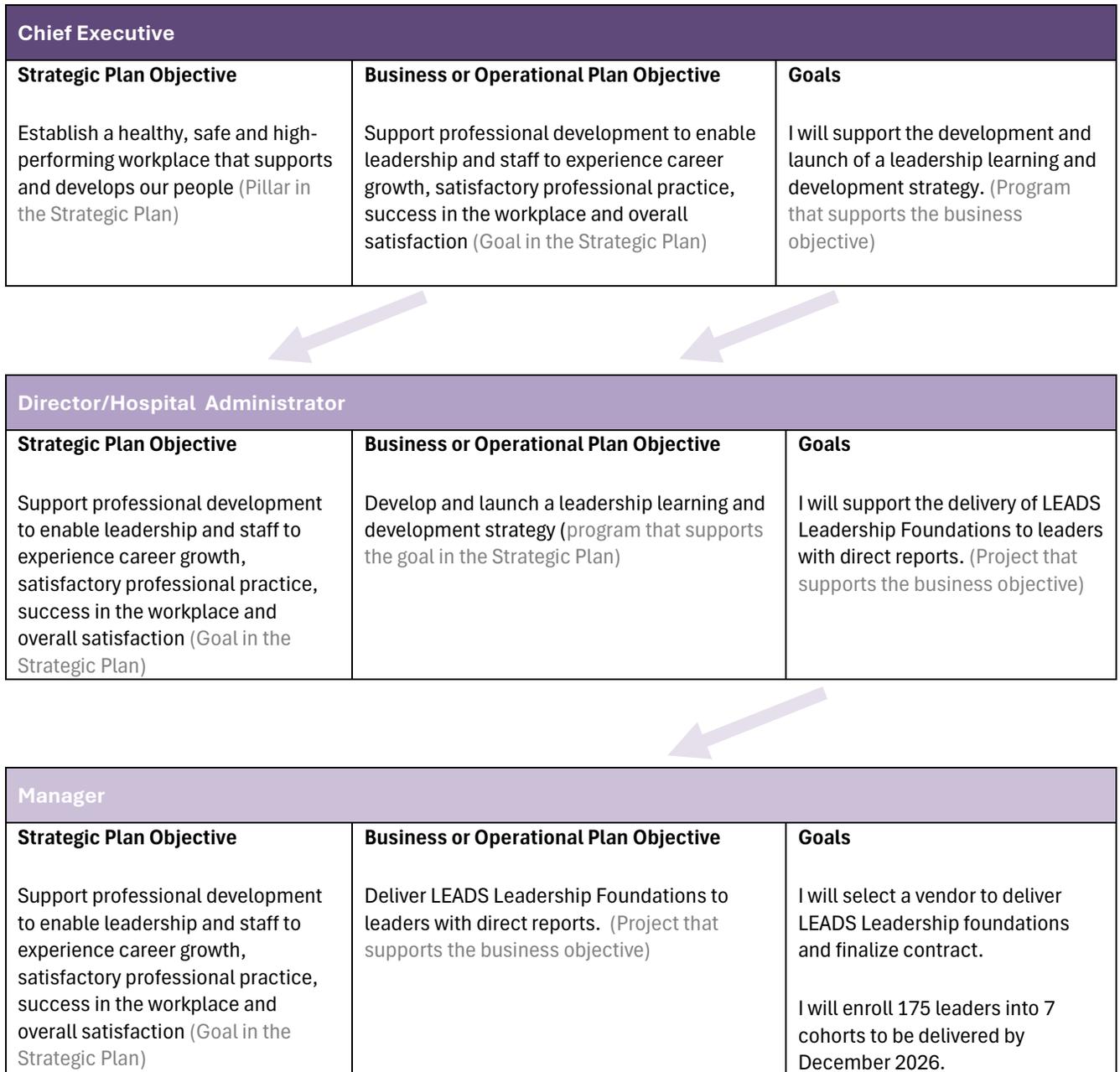
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Cascading Objectives and Goals through a Department

Aligned objectives and goals typically (but not always) cascade through a department.

For example:



How to set SMART goals

SMART goals provide leaders with a framework for deliverables that can help teams accomplish tasks and projects on time with desired outcomes. They provide:

- Alignment with corporate priorities
- Clarity on expectations
- Clarity on deadlines
- Improved efficiency & increased productivity
- Enhanced motivation and a sense of ownership

SMART goals meet the following criteria.

S – Specific	Clearly defines what you want to accomplish.
M – Measurable	Includes measurable indicators to track progress.
A – Achievable	Ensures the goal is realistic and attainable.
R – Relevant	Aligns with broader objectives or values.
T – Time-bound	Includes a deadline for achieving the goal.

How to write your goals

- Begin your goal with “I will...” to foster personal ownership and accountability.
- Use action verbs (e.g., launch, implement, increase, develop).
- Avoid vague language (e.g., “improve performance”).
- Focus on controllable actions (what you and your team can do).
- Pair outcome goals with activity goals to show how the outcome will be achieved (e.g., “Increase program enrollments by 20% by implementing targeted social media campaign.”)

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Tips for monitoring and adjusting goals and objectives

- Use planners and dashboards to track progress.
- Review during regular one-on-ones, team meetings as appropriate, and in the quarterly reviews.
- Be flexible and adjust based on changing priorities, unforeseen barriers out of your control or new information.
- Celebrate milestones and recognize achievements.

For more examples of aligned objectives and goals view the sample PIDF at the end of this guide.



Need help setting goals?

Take the Goal-Setting course on [Harvard ManageMentor](#).

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How to create Personal Development and Learning Plans (PDLPs)

PDLPs help leaders align learning and development with strategic objectives, LEADS competencies and key areas for their professional growth. They encourage a proactive approach to development by outlining goals in the following areas.

Competency and Strategic Learning Goals	<p>Learning opportunities that build or enhance skills, knowledge and behaviours required for effective performance and the achievement of objectives and goals.</p> <p>Learning opportunities that enhance LEADS capabilities.</p> <p>Learning opportunities aligned with broader organizational goals, cultural shifts or innovation strategies, often aimed at driving change or preparing for the future.</p>	<p>Examples:</p> <p>Diversity, equity, inclusion and belonging training</p> <p>Leading change training</p> <p>AI in healthcare seminar</p> <p>Mini-MBA program</p>
Career Development goals	<p>Development opportunities that support an employee's long-term aspirations and progression within the organization.</p>	<p>Examples:</p> <p>Mentorship programs</p> <p>Stretch assignments</p> <p>Formal learning geared toward a professional designation or certification such as a CHE, MBA, etc.</p>

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Plans should include a mix of formal learning, on-the-job development, and self-directed growth. The following menu offers a range of activities that leaders can use when building performance development and learning plans for individuals in leadership roles.

Development Opportunity	Examples
Formal Training & Courses	Leadership training programs Online learning Conferences & workshops Certifications
Mentorship & Coaching	Internal/external mentorship with cross-functional peer or senior leader Professional coaching Mastermind groups
On-the-Job Skill Building	Stretch and 'acting' assignments Leadership department rotations Job shadowing
Self-Directed Learning	Books and industry publications Webinars Podcasts & TED Talks



Contact the Learning & Development Team (learning@ihis.org) for information on:

Harvard ManageMentor online courses

Management Essentials learning series

Insights Discovery (coming in 2026)

LEADS Leadership Foundations (coming in 2026)

Mini MBA program (coming in 2026)

How to Conduct Quarterly Check-ins and Annual Reviews

Professional Impact & Development Conversations: A Strategic Opportunity

Professional impact and development discussions are a chance to build alignment, drive growth, and strengthen engagement. While the process calls for three check-ins per year, effective managers provide feedback and coaching year-round. These ongoing conversations help surface achievements, address challenges early, and keep goals on track—so there are **no surprises** during the annual review.

Use these moments to discuss shifting priorities, resource needs, and progress toward goals. Recognize strong performance, address concerns constructively, and ask open-ended questions to encourage reflection. Keep the focus on observable behaviors and outcomes, not personal traits, and use professional impact and development as a tool for development—not discipline.

Quick Tips for Managers

- Be clear and constructive when addressing challenges.
- Use active listening and ask open-ended questions.
- Recognize all levels of performance.
- Address issues early; don't wait for formal reviews.
- Keep the tone supportive, forward-looking, and focused on growth.

Performance conversations: feedback vs. coaching

As you guide employees through the professional impact and development cycle, you'll use both feedback and coaching to support their growth.

Think of feedback as a mirror—reflecting what has happened—and coaching as a compass—helping navigate what comes next. Both are essential tools for driving performance and development.

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Feedback

Definition: Feedback is information shared about past behavior or performance with the goal of influencing future actions.

Key Practices:

Be specific and evidence-based	Use real examples to clarify what worked or what needs improvement.
Foster psychological safety	Create an environment where employees feel comfortable asking questions and seeking clarification.
Balance the message	Highlight strengths before addressing areas for improvement.
Make it actionable	Offer clear, practical suggestions for improvement.

Examples of Feedback Questions:

- Can I share an observation from the meeting yesterday?
- Here's something I noticed—how do you see it?
- What might you do next time instead?

Coaching

Definition: Coaching is an ongoing process of guiding and supporting employees in achieving their goals through reflective, forward-looking conversations.

Key Practices:

Hold regular check-ins	Consistent conversations build trust and momentum.
Listen actively	Go beyond surface-level issues to understand deeper motivations and challenges.
Align on expectations	Clarify goals and outcomes to maintain accountability.
Encourage self-reflection	Help employees generate their own insights and solutions.

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Examples of Coaching Questions:

- What's getting in the way of your progress?
- What options can you think of to get around that barrier?
- What might you do to make that happen?

Watch for these biases

Recognizing and mitigating these biases is crucial for fair and effective performance assessments. Below is a summary of common biases to watch out for during professional impact and development discussions.

Bias Type	Description
Recency Bias	Overemphasizing recent events while overlooking earlier performance.
Halo/Horns Effect	<i>Halo:</i> One positive trait influences the entire review. <i>Horns:</i> One negative trait dominates.
Similarity Bias	Favoring those with similar backgrounds or interests, leading to favoritism.
Confirmation Bias	Interpreting information to confirm existing beliefs about an employee.
Central Tendency Bias	Rating most employees as average to avoid tough evaluations.
Leniency/Strictness Bias	<i>Leniency:</i> Overly positive ratings. <i>Strictness:</i> Overly harsh evaluations.
Gender and Racial Bias	Allowing stereotypes or unconscious bias to influence assessments.
Anchoring Bias	Relying too much on first impressions or past ratings.
Length of Service Bias	Assuming longer tenure equals better performance or loyalty.

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Navigating the Professional Impact and Development Process

Quarterly Check-ins and Annual Reviews: A Step-by-Step Checklist

Whether leading a quarterly check-in or an annual review, having a clear structure helps ensure the conversation is focused, productive, and meaningful for both you and your employee.

The checklist below will guide you through each stage of the conversation—from preparation to follow-up—so you can lead with clarity, confidence, and impact.

Before the Meeting	Done
Schedule the meeting in a quiet, private space in advance.	
Share the PIDF with the employee. Ask them to: <ul style="list-style-type: none">• review it• note any goals or objectives that have changed or need to be changed• provide examples of how they have demonstrated the LEADS capabilities in the last quarter• update their PDLP	
Review the employee’s objectives and goals.	
Review any notes taken during the last meeting.	
Make note of important Health PEI updates that should be discussed.	
Plan open-ended questions to spark meaningful dialogue.	

During the meeting	Done
Document all changes, updates and commitments in the PIDF.	
Part 1: Set the tone.	
Clarify the purpose and structure of the meeting.	

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During the meeting	Done
Encourage two-way communication, beginning with the employee's observations.	
Start with recognition: highlight strengths and wins.	
Part 2: Review goals and impact.	
Assess progress on short-term goals and long-term projects.	
Summarize accomplishments and completed work.	
Share available results or data to show impact.	
For each goal, note the percentage achieved on the PIDF.	
Recognize performance (see the tips following this checklist in this guide).	
Identify barriers beyond the employee's control impacting goal achievement.	
Collaboratively update and realign existing goals to adjust for unforeseen barriers.	
During quarterly reviews, confirm or define new goals for the upcoming period.	
Constructively address any performance gap (see the tips on page 25).	
During annual reviews, assign each objective a rating based on the level to which the goals supporting it were delivered by the employee (see page 21).	
<p>Guide your discussion about goals with these questions:</p> <ul style="list-style-type: none"> ● What steps are needed to achieve each goal? ● What goal milestones have been achieved since the last check-in? ● Do any goals need to be modified due to changing priorities? ● Are there any new goals that need to be created? ● What blocked your progress, and what could you do differently? ● Any lessons learned since the last check-in? 	

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Navigating the Professional Impact and Development Process

During the meeting	Done
Part 3. Review LEADS capabilities	
Acknowledge and highlight the employee’s strengths by linking them to specific LEADS capabilities.	
Share concrete examples that illustrate how these strengths show up in their work. If not already on the form, add these in the manager’s comments on LEADS Capabilities Evaluation form.	
Collaboratively identify strengths to build on.	
At the annual review, rate each employee on their LEADS capabilities (see page 21).	
Part 4. Plan and review development and learning.	
Highlight relevant education, training, or upskilling accomplished.	
Mention participation in special projects, teams, or committees.	
Recommend relevant training, learning, and developmental opportunities to build competencies areas identified as needing improvement while reviewing the goals and LEADS capabilities.	
Part 5. At the end of the meeting, summarize.	
Recap key discussion points and shared insights.	
Reinforce action items and coaching advice.	
Invite the employee to share anything overlooked.	
Schedule the next meeting (quarterly or annual).	
During annual reviews, assign the employee an overall impact rating (see page 21).	

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After the Meeting	
Note key takeaways and any actions you agreed to in order to support the employee.	
Share the PIDF with the employee.	
When you complete an annual review, send a hard copy of the signed PIDF in a sealed envelope to the employee's human resources manager.	
Provide ongoing coaching and feedback with regular, informal check-ins and one-on-one meetings.	

Performance Ratings

During the annual review, the manager uses the following scale to rate the employee on how well they:

- Achieved each objective (accounting for uncontrollable barriers)
- Demonstrated each LEADs capability
- Made an overall impact in the last fiscal year

Rating Scale

Did Not Deliver	Falls short of expectations; immediate improvement is required.
Developing	Partially meets expectations but progress is inconsistent, and improvement is needed.
Delivers	Consistently meets expectations with solid and reliable contributions.
Exceeds	Regularly goes beyond expectations with strong outcomes in all areas.
Exceptional	Continuously surpasses expectations with outstanding results and significant impact.

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Leaders at Health PEI are expected to deliver on their objectives.

Given the complexity of health care and the interconnected systems we work in, this is often not easy: unexpected obstacles and barriers often show up along the way. Leaders who deliver on their objectives should be commended. The exceeds and exceptional ratings have been included to recognize leaders who go above and beyond; however, this is not expected.

The rating scales are included to provide accountability, identify gaps, and recognize performance. Leadership pay is not linked to ratings.

How to recognize various levels of performance

Recognizing an employee's impact reinforces desired behaviors and outcomes and cultivates a culture where individuals feel seen, valued, and motivated to grow.

Whether an employee is consistently exceeding expectations or making meaningful progress in their development, timely and thoughtful recognition can drive engagement, boost morale, and support retention.

This section outlines how to recognize varying levels of performance, from exceptional to developing, offering practical guidance on when and how to acknowledge contributions in ways that are meaningful and aligned with Health PEI's values.

Tailor your approach to the employee

Not everyone feels valued in the same way. Some may appreciate public praise, while others prefer a private thank-you or a handwritten note. Some may relish additional responsibilities while, while others may be at capacity and prefer an opportunity to step away to an off-site conference or course.

By taking the time to understand and respect individual differences, managers demonstrate genuine care and attentiveness, which fosters trust and strengthens the employee-manager relationship.

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Navigating the Professional Impact and Development Process

Use the following recognition guidelines to recognize the various performance ratings.

Recognizing exceptional performance

Definition: consistently exceeds all job expectations with outstanding results and significant contributions

Recognizing exceptional employees reinforces a culture of excellence and motivates others to strive for similar achievements. It acknowledges the extraordinary impact these individuals have on the organization.

When to recognize?

Recognition should be timely and aligned with major accomplishments, project completions, or quarterly reviews. It can also be tied to award submissions, department meetings or special events.

Recognition ideas

- Public acknowledgment in team or department meetings
- Features in internal newsletters
- Features on social and traditional media
- Opportunities to lead high-visibility projects
- Personalized thank-you notes from leadership
- Professional development opportunities (e.g., conferences, certifications).
- Award submissions

Recognizing performance that exceeds

Definition: regularly goes beyond expectations; demonstrates proficiency in all areas.

Recognizing employees who exceed expectations encourages continued high performance and helps retain top talent. It also fosters a sense of appreciation and belonging.

When to recognize?

Recognition should occur during performance reviews, after successful project milestones, or when consistent above-average performance is observed.

Recognition ideas

- Team shoutouts in internal newsletters.
- Appreciation emails
- Involvement in mentoring or training others
- Access to stretch assignments or cross-functional projects
- Lunch with leadership or skip-level meetings
- Certificates of appreciation or digital badges

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Recognizing performance that delivers

Definition: consistently meets expectations; fully capable, with some areas of above-average performance.

Recognizing consistent performers reinforces reliability and encourages them to continue delivering quality work. It also builds morale and engagement.

When to recognize?

Recognition should be ongoing, especially after completing routine tasks with diligence or showing initiative in specific areas.

Recognition ideas

- Regular feedback and check-ins with positive reinforcement
- Team-wide appreciation during stand-ups or retrospectives
- Opportunities to share best practices or lead small initiatives
- Thank-you notes or peer recognition programs
- Nomination for internal recognition boards

Recognizing performance that is developing

Definition: some expectations, but performance gaps remain and need improvement.

Recognizing effort and progress in developing employees builds confidence and supports a growth mindset. It encourages continued improvement and shows that development is valued.

When to recognize?

Recognition should be given when noticeable progress is made, after training completion, or when new skills are applied successfully.

Recognition ideas

- One-on-one encouragement and coaching feedback
- Assigning manageable responsibilities to build confidence
- Celebrating small wins and learning milestones
- Providing access to learning resources and mentorship

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Navigating the Professional Impact and Development Process

How to address poor performance

Tackling performance challenges head-on is essential to creating a culture of accountability, growth, and support. It's not just about correcting issues—it's about helping employees succeed while keeping your team and deliverables on track. A fair, transparent, and structured approach—aligned with HR policies and union agreements where applicable—ensures consistency and trust.

Start by addressing concerns early. Don't wait for formal reviews. Focus on behaviors and outcomes, not personal traits, and use the professional development and impact framework as a tool for development, not discipline. If personal or medical issues are disclosed, consult your human resources manager promptly—accommodations may be required.

In every conversation, aim to:

- Identify processes or methods that need improvement.
- Reinforce expectations for workplace behavior and conduct.
- Provide constructive, specific feedback that supports progress.

Leading with clarity and empathy creates conditions for continuous improvement and long-term success.

1. Catch performance issues early and build a clear, factual record.

What to Do:

- Regularly observe and assess employee performance using metrics, feedback from others, and direct observation.
- Identify gaps between actual performance and expected standards.
- Begin documenting specific incidents—include dates, impacts, and unmet expectations.
- Use neutral, objective language to avoid bias.

Tips:

- Apply consistent evaluation criteria across your team.
- Revisit job descriptions, performance expectations, and the goals outlined in the employee's PIDF to ensure alignment and clarity.

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Navigating the Professional Impact and Development Process

2. Provide timely, clear feedback and support to allow the employee to correct the issue.

What to Do:

- Schedule a private, respectful conversation to raise concerns.
- Approach the discussion with a coaching mindset—focus on development, not discipline.
- Clearly explain the issue, its impact, and what needs to change.
- Invite the employee’s perspective and listen actively.
- Collaboratively explore root causes and agree on a path forward.

Follow-up:

- Offer ongoing encouragement and feedback.
- Document the conversation, agreed actions, and timelines.

3. Equip the employee with tools, guidance, and regular check-ins while monitoring improvement.

What to Do:

- Create a short-term, informal action plan with clear, measurable goals.
- Provide access to relevant training, coaching, or job aids.
- Hold regular check-ins to assess progress and adjust support as needed.
- Keep a record of each meeting, progress made, and resources provided.

Key considerations:

- Maintain fairness and consistency throughout.

4. Formally address ongoing poor performance with a Performance Improvement Plan (PIP)

When to Initiate a PIP: when previous efforts have not resulted in sustained improvement.

Before initiating a PIP:

- Consult with your human resources manager to ensure alignment with policies and union agreements.
- Review the [Performance Improvement Plan](#).

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Navigating the Professional Impact and Development Process

During the PIP discussion:

- Stay supportive and professional.
- Ensure documentation is thorough and consistent.
- Keep your human resources manager apprised.

Frequently Asked Questions

Where can I find the Performance Development Forms?	The Professional Impact and Development forms can be accessed on the Professional Impact and Development page on the Staff Resource Centre.
How do I add tables and rows to the form?	See these instructions from Microsoft: <ul style="list-style-type: none">• Add a row• Copy a table Alternatively, you can ask Copilot to coach you through it.
When will we have electronic forms?	People and Professional Practice is investigating options for an online performance management system with a target launch for the 2027-28 fiscal year.
I am a manager, but I don't have direct reports. Should I do a PIDF?	Yes, if you are excluded. This will help you align the programs, projects or initiatives you manage with strategic priorities. If you are a unionized employee, do not do a PIDF at this time.
I am supervisor. Which form should I use?	Use the PIDF for managers.
What form should I use for my staff who aren't leaders?	Continue to use the Performance Development Plan for Employees and supplementary resources available on the Performance Development Toolkit on the Staff Resource Centre.

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Navigating the Professional Impact and Development Process

<p>When will the current staff forms and process be updated?</p>	<p>This will be done in collaboration with union partners and other stakeholders. The timing is to be determined.</p>
<p>How often should we meet to discuss professional impact and development?</p>	<p>Ideally, you should meet with your direct reports at least once a month.</p> <p>For the PIDF process, during the 2025-26 fiscal year, managers and employees should set SMART goals for the rest of the fiscal year by November 28, 2025. This should be followed by a quarterly check-in in January and a year-end review to be finalized by March 31, 2026.</p> <p>Following this initial cycle, managers and employees set SMART goals at the start of every fiscal year (April). These are reviewed at quarterly check-ins in July, October and January to support progress. The final review is completed at year-end.</p>
<p>How do I manage the professional impact and development process for direct reports on leave?</p>	<p>If the employee is away during the normal timing of annual planning, quarterly check-ins or the annual review, the meeting can be delayed until the employee returns.</p> <p>If the leave is extended or indefinite, goals may need to be assigned to someone else. Performance reviews may be cancelled for employees on extended leave of absence.</p>
<p>Can we blend the quarterly meetings into our regular one-on-ones?</p>	<p>Yes. If you normally meet at one of the quarterly times (July, October and January), use your regular meetings at these times to go through and update the PIDF. You may need to schedule extra time for these meetings.</p>
<p>How much time does annual planning require?</p>	<p>In general, if you are preparing your plan before meeting with your manager, block two to three hours to determine objectives, set SMART goals and develop your Professional Learning and Development Plans.</p>

Health PEI

Navigating the Professional Impact and Development Process

	<p>Managers should set aside 45 to 60 minutes to review the plan and another 60 minutes for the planning meeting.</p> <p>If the manager and employee decide to fill out the blank plan together, the process may take up to three hours.</p> <p>Plans with more than 10 objectives may take longer or require multiple meetings.</p>
<p>How much time will the quarterly check-in and annual performance review meetings take?</p>	<p>Depending on the number of objectives and the level of feedback required, quarterly check-ins could take between 45 minutes and 90 minutes.</p> <p>The final annual performance review meeting should take 45-60 minutes.</p>
<p>What if the timeline does not work for me (e.g., due to heavy high-priority work at the same time)?</p>	<p>Although it is recommended to follow the suggested timelines in the professional impact and development guide, there may be exceptional cases where this is not possible. Leaders should work with their direct reports to find a date that works best for both.</p>
<p>Do I need to send my annual plan to anyone besides my manager/employee?</p>	<p>No. The annual plan is a working document for the manager and employee to return to throughout the year.</p> <p><i>At the end of the year, after the annual review is completed, you should send the completed PIDF in a sealed envelope to the employee's human resource manager.</i></p>
<p>Can I change my goals after they have been approved by my leader/manager?</p>	<p>Yes, SMART goals can be changed/modified at quarterly check-ins and the year-end review if applicable. These changes should be reviewed and approved in collaboration with your leader.</p>
<p>How are goals and objectives evaluated in a quarterly check-in?</p>	<p>During the quarterly check-ins, note the percentage of the goal achieved so far. If there are delays, you are ahead of schedule, the goal has been modified or there</p>

Health PEI

Navigating the Professional Impact and Development Process

	<p>are other noteworthy items related to the goal, note that in the comments.</p>
How should I treat multi-year goals?	<p>Break multi-year goals down into annual goals and note the percentage of the annual goal achieved. Note on the PIDF that the goal is part of a multi-year project, process or initiative.</p>
How can I make the LEADS examples part of the form easier?	<p>As you experience successful moments and interactions with others throughout the year, a good practice is to reflect on the experience and ask yourself what LEADS capability did I just use? Put this down in your PIDF immediately or keep a related running file to track these examples.</p>
What if I can't think of an example where I used a LEADS capability?	<p>Leave the example section blank and discuss this with your manager. They may know of an example or you may need to develop that capability further.</p>
Can we use electronic signatures?	<p>Yes, electronic signatures are acceptable.</p>
What happens if my progress during a quarterly check-in is poor?	<p>Professional Impact and Development meetings are a tool for identifying how best to support you and your work.</p> <p>Development is a shared responsibility that requires active participation from both you and your manager, supported by the organization.</p> <p>Your manager will work with you to find the cause(s) of your performance and suggest ways to improve it. Some tips are included in this guide under “Addressing Poor Performance.”</p> <p>For self-directed training in a variety of leadership skills, see the Leadership Toolkit available through the Staff Resource Centre.</p>

Health PEI

Navigating the Professional Impact and Development Process

Who schedules the meetings for performance planning, quarterly check-ins, and the annual review?	The employee and manager should jointly coordinate times for reviews and meetings.
Why is the Professional Impact and Development Form (PIDF) important?	Your goals matter. By completing the PIDF, you are investing in your growth, strengthening team alignment, and helping shape a culture of excellence at Health PEI. It's a chance to reflect, grow, and lead with purpose.
Is pay tied to performance?	Not at this time. The Professional Impact and Development process is a tool for you to align your actions with strategic priorities, stay accountable throughout the year, reflect on your goals, and develop your skills as a leader.
Are 360 reviews a part of this process?	Not at this time.
Privacy: who has access to my performance review information and records?	Your performance review information and records will be stored in your employee file with your human resources manager. You, your manager, and your human resources manager will have access to this information.
What is the professional impact and development process for a new employee?	Employees who join mid-year have flexibility in completing professional impact and development forms and may set and achieve goals on an adjusted timeline in collaboration with their manager.

Health PEI

Navigating the Professional Impact and Development Process

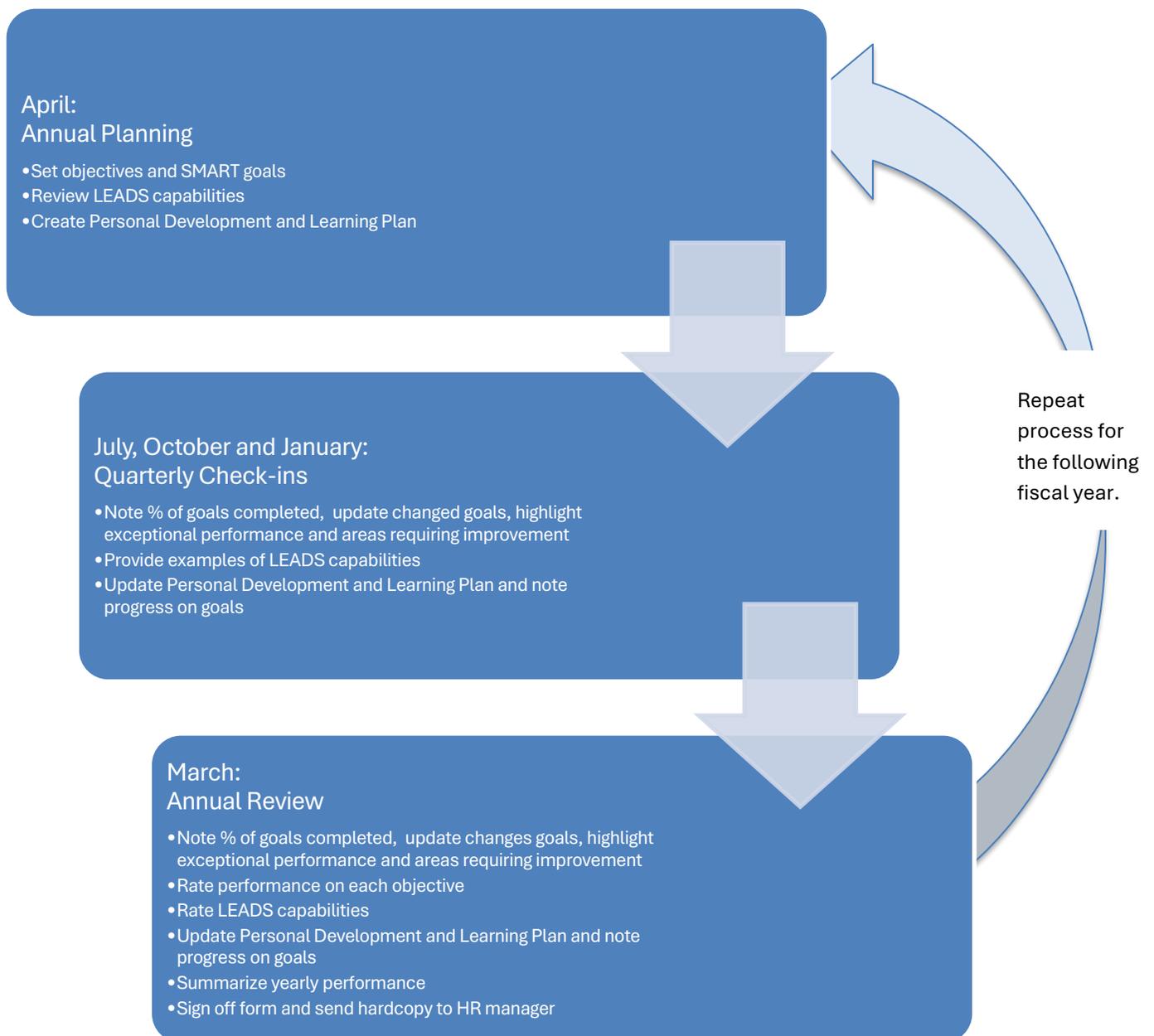
What resources are available to use for the professional impact and development process?

In addition to the information in this guide, Harvard ManageMentor has numerous courses to assist with performance discussions and employee development.

See the list on the [Leadership Toolkit](#) or contact the Learning and Development team at learning@ihis.org for access and to learn more about upcoming workshops.

Appendix A

Professional Impact and Development Timelines



Appendix B

Health PEI Vision, Mission and Values

Our Vision: The leading rural health care system, founded on robust primary care that is accessible to all.

Working collaboratively across our organization, with our patients, clients and families, and with our communities as our partners, we will continue to innovate and build a robust rural system that delivers high-quality care - not just for today but for the future.

Our Mission: Delivering high-quality, person-centred care to every Islander

Health PEI exists to provide excellent healthcare to every Island resident that needs it. Our people are dedicated to this mission and each day work to provide care that is safe, reliable, effective and patient-centred.

Our Values:

Our values are what we stand for. Our values are what we stand by. Our values will shape everything we do and guide us to be and do better, every day.

1. **We demonstrate accountability.** We are collectively and individually responsible for achieving our vision, and we answer to the people we serve, all Islanders.
2. **We act with care.** We care for Islanders, for each other and the quality, safety and outcomes of our work and its impacts on Islanders and communities.
3. **We work together.** We build trusting relationships to achieve common goals, patients and clients come first. We listen to and involve patients, clients, communities and staff in the services we deliver and the challenges we solve.
4. **We strive for excellence.** We hold ourselves to national standards, measure and report transparently, and continually learn and improve. We commit to accepting feedback, sharing transparently our progress and our shortfalls.

Appendix C

Sample of a Professional Impact and Development Form

The following is a sample of a fictional PIDF following a first quarter check-in. The examples are not meant to represent the deliverables of any specific leader or team and are purely for training purposes.

Part 1: Employee Information

Employee name	John Adrian Doe		
Employee number	123456		
Employee job title	Director		
Employee department	Human Resources		
Manager name	Russel William Crowe		
Manager job title	Executive Director		
Manager department	Human Resources		
Evaluation period from	01/04/2025	Evaluation period to	31/03/2026

Health PEI

Navigating the Professional Impact and Development Process

Part 2: Objectives

Strategic Plan Objective:	Establish a healthy, safe and high-performing workplace that supports and develops our people.		
Business or Operational Plan Objective:	Lead the implementation across all departments of a comprehensive employee well-being program including mental, social and physical aspects of health by the end of 2026.		
SMART Goals How will you achieve your department objective? Using “I will” statements, list one SMART goal per row to track progress and results for the role specific objective. Add more rows if required.	Completion Target Date	Percentage Achieved	
I will conduct a baseline employee well-being survey by May 30, 2025 with at least 65% response rate.	30/05/2025	90%	
I will develop and launch a quarterly well-being dashboard by April 2026 to track participation, satisfaction, and impact metrics across all departments.	30/09/2025	40%	
I will recruit and train at least one wellness ambassador per department by September 30.	31/12/2025	30%	
I will launch three social connection clubs/programs for staff across all departments and regions by October 1.	03/31/2026	0%	
Updates: During each quarterly check-in and the annual review, note the percentage achieved next to each goal above. Add the meeting date and comment on the achievement of goals and executive performance below.			
July 15, 2025 Check-in Director comments: Survey response rate was 57%. Team is following up with areas that didn't respond. Unit is researching best practices in dashboards and on track. Ambassador recruitment roll out plan is complete and set for early Sept. Social clubs will be contingent on final survey results and ambassador input (to be decided by Dec. 1).	July 15, 2025 Check-in Executive Director comments: Team is on track with objective and continues to work around obstacles. Please continue to make this objective a priority. Suggest you reach out to Manitoba Health to learn about their program.		
October [date] Check-in Director comments: :	October [date] Check-in Executive Director Comments:		
January [date] Check-in Director comments: :	January [date] Check-in Executive Director Comments:		
Annual Review [date] Director Comments:	Annual Review [date] Executive Directors Comments:		
Annual Review Rating: At the end of the fiscal year, the executive director/chief rates the director's achievement of the business or operational plan objective as Exceptional, Exceeds, Delivers, Developing or Did Not Deliver. See page 5 for rating definitions.	Annual Review Rating:		

Health PEI

Navigating the Professional Impact and Development Process

Corporate Objective:	Develop new and innovative approaches to improve efficiency and utilization of health care resources		
Department Objective	By Q4 2026, design and implement an HR-led workforce optimization strategy that leverages data analytics and digital tools to improve staffing efficiency and enhance workforce deployment across clinical and support services.		
Role Specific Objective	By Q4 2026, lead the successful implementation and adoption of a new Applicant Tracking System (ATS) to streamline recruitment processes, reduce time-to-fill by 10%, and improve hiring manager satisfaction scores by 25%.		
SMART Goals How will you achieve your department objective? Using “I will” statements, list one SMART goal per row to track progress and results for the role specific objective. Add more rows if required.	Completion Target Date	Percentage Achieved	
I will launch ATS to enhance recruitment efficiency and data-driven decision-making.	30/09/2025	50%	
I will train 70% of hiring managers using the system.	31/10/2025	0%	
I will develop and deliver hiring manager resources based on the 3 most common requests.	30/08/2025	90%	
I will survey hiring managers for satisfaction levels with goal of achieving 25% improvement in hiring manager satisfaction from Nov. 30, 2025 (via post-hire surveys).	30/11/2025	20%	
Updates: During each quarterly check-in and the annual review, note the percentage achieved next to each goal above. Add the meeting date and comment on the achievement of goals and executive performance below.			
July 15, 2025 Check-in Director comments: ATS launch delayed from June until Sept. due to technical issues at ITSS. Managers will be trained by November. Goal target completion dates revised from initial targets of June 30 and Sept 30 respectively. All resources ready for launch. Satisfaction survey has been drafted.	July 15, 2025 Check-in Executive Director comments: Please continue to be proactive with this objective and continue to support hiring managers with current manual system until launch. I will work with senior leadership at ITSS to see if we can find solution to the delay.		
October [date] Check-in Director comments: :	October [date] Check-in Executive Director Comments:		
January [date] Check-in Director comments: :	January [date] Check-in Executive Director Comments:		
Annual Review [date] Director Comments:	Annual Review [date] Executive Directors Comments:		
Annual Review Rating: At the end of the fiscal year, the executive director/chief rates the director’s achievement of the business or operational plan objective as Exceptional, Exceeds, Delivers, Developing or Did Not Deliver. See page 5 for rating definitions.	Annual Review Rating:		

Health PEI

Navigating the Professional Impact and Development Process

Part 3: LEADS Capabilities Evaluation

Director/ Hospital, Facility Administrators LEADS Capabilities Evaluation

Ratings: Exceptional, Exceeds, Delivers, Developing, Did Not Deliver

LEADS SELF		
Manages self with integrity, accountability, and self-awareness, showing awareness of their own behavior on others.		
This capability aligns with the HPEI value of accountability. It reflects ethical conduct and personal responsibility.		
Meeting	Director/ Hospital, Facility Administrators Examples/Rating	Executive Director/Chief Comments/Rating
July Check-in	Comments: I have been practicing stress reduction techniques when facing obstacles to stay calmer.	Comments: I have noticed more composure. Keep up the good work.
October Check-in	Comments:	Comments:
January Check-in	Comments:	Comments:
March Annual Review	Rating:	Rating:
	Comments:	Comments:

Health PEI

Navigating the Professional Impact and Development Process

Champions a Culture of Learning and Models Strategic Professional Growth This capability aligns with the HPEI value of excellence. Demonstrates a deep commitment to excellence by actively fostering a culture of continuous learning and development across the organization.		
July Check-in	Comments: I have reached out to the ED for advice and also am working through an emotional intelligence course.	Comments: Thank you for reaching out. Please continue to implement your learnings from the course.
October Check-in	Comments:	Comments:
January Check-in	Comments:	Comments:
March Annual Review	Rating:	Rating:
	Comments:	Comments:

Health PEI

Navigating the Professional Impact and Development Process

Part 4: Personal Development and Learning Plan

Your **Personal Development and Learning Plan (PDLP)** guides you in setting focused goals and monitoring your progress, strengthening self-awareness, motivation, and career direction. It also highlights key skills to develop to support leadership capabilities and strategic objectives and outlines actionable steps that support your long-term growth.

Use the section below to identify and build on development opportunities, while also seeking feedback to uncover potential blind spots—areas for growth you may not be fully aware of. Detail specific learning initiatives, training needs, and career opportunities that will support your success. Replace the examples in grey text with your personalized goals and plans. Add more rows as needed.

Competency and Strategic Learning Goals based on performance objectives, LEADS competencies and additional strategic and operational needs	Learning & Development Initiative(s) to meet your learning goal	Target Completion Date	% Achieved
Improve resilience and comfort with uncertainty	Complete emotional intelligence course with the Performance Intelligence Institute	Oct 31, 2025	
Enhance overall leadership capacity	Enroll in and be working through mini-MBA program	March 31, 2026	
Become familiar at administrator level with new ATC	Have team specialist train me in administrator functions once launched	Dec 31, 2025	

Career Development Goals based on aspirations for career progression within Health PEI	Learning & Development Initiative(s) to meet your career development goal	Target Completion Date	% Achieved
Progress to an executive director level	Develop systems thinking skills while leading a cross-department committee	March 31, 2026	

Health PEI

Navigating the Professional Impact and Development Process

This following contains examples of the types of comments you might make during your annual review based on your level of performance.

Part 5: Annual Review -Employee & Manager Feedback

Complete this section at the conclusion of the annual performance review. During the meeting, the manager and employee should add their comments and **sign off together**.

Overall rating by the manager on the employee's performance: Exceptional, Exceeds, Delivers, Developing, or Did Not Deliver. See page 5 for rating definitions.	
Employee comments and feedback: Use this space to reflect on your professional impact, accomplishments, and opportunities for growth. Indicate your agreement or disagreement with the professional impact and development review, the overall rating, and the information recorded in this form.	
1. Strong Performance Example – Employee Response Thank you for the feedback. I'm glad my contributions have positively impacted the team, and I'll continue to build on this momentum and seek new ways to add value.	
2. Steady Performance Example – Employee Response I appreciate the feedback and will look for opportunities to take more initiative in cross-functional projects to broaden my impact and support team goals.	
3. Growth-Focused Example – Employee Response Thank you for highlighting my progress. I'm committed to continuing my development in the areas we discussed and appreciate the support and guidance along the way.	
Employee name:	
Employee signature:	Date signed: DD/MM/YYYY

Health PEI

Navigating the Professional Impact and Development Process

Manager comments and feedback:

Use this space to summarize the annual professional impact and development discussion, achievements, growth opportunities, and any other related information entered in this form.

Manager name:**Manager signature:****Date signed: DD/MM/YYYY****Manager instructions after signing this form:**

1. Provide a digital or hard copy to the director being reviewed.
2. Provide a hard copy in a sealed envelope to the director's human resources manager to place in their personnel file.
3. Start a new professional impact and development cycle by downloading a new Professional Impact and Development Form (available under Forms on the Staff Resource Centre) and completing step 1 (Planning).