

Health PEI

Excluded Leader

Professional Impact and Development Plan Guide

All non-unionized (excluded) managers, directors, executive directors and chief executives, including those who do not have direct reports, are required to submit an annual PIDP using the [Professional Impact and Development Plan \(PIDP\) form](#). (Leaders who are members of a union and all other employees should use the [Performance Development Plan for Employees form](#).)

Your PIDP helps ensure that you:

- Understand expectations and priorities
- Set clear goals aligned with organizational objectives
- Receive fair evidence-based annual evaluations
- Develop leadership capabilities grounded in Health PEI's values and the LEADS framework
- Identify learning and development opportunities
- Contribute to a culture of accountability, growth, and excellence

The PIDP process also supports Health PEI's Accreditation Canada requirements.

For the purposes of this guide and the PIDP:

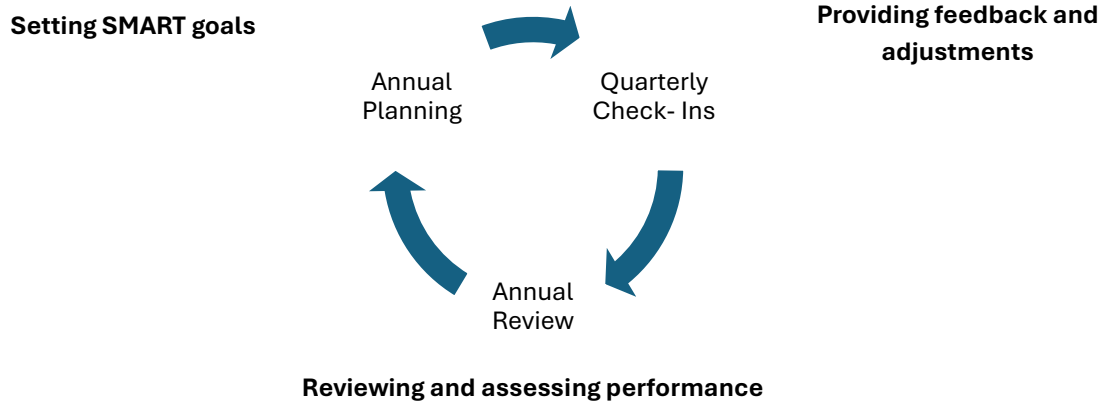
Employee refers to the excluded (non-unionized) leader to whom the plan applies.

Manager refers to the person the excluded leader reports to.

Roles and Responsibilities

Manager	Employee	People & Professional Practice
Set clear expectations and goals collaboratively	Actively participate in planning and check-ins	Provide tools, resources, and guidance
Provide regular, informal coaching and feedback	Track progress and update the PIDP	Support leaders in applying ratings
Recognize achievements and address concerns early	Seek feedback and support as needed	Review and refine the framework as needed
Apply ratings fairly and consistently	Demonstrate LEADS capabilities in daily work	
Support employee development	Engage in learning and development activities	
Conduct an annual review		

The Professional Impact and Development Cycle



AT THE START OF THE FISCAL YEAR (OR WHEN A NEW EMPLOYEE JOINS THE TEAM)

1. Complete all identification fields in Part 1 of the PIDP. For example:

Employee name: Jane Doe
Job title: Nurse Manager
Employee manager name: John Doe
Evaluation period from: 01/04/2027

Employee number: 123456
Department: QEH Unit 1
Employee manager title: Director Nursing
Evaluation period to: 31/03/2028

2. Set the employee's strategic goals in Part 2 of the PIDP.

Some managers may ask employees to draft goals in their PIDP form before reviewing and finalizing them in a meeting; others prefer to create them collaboratively.

Each goal should contribute to one or more of the strategic priorities listed on the form. You can set goals using a bottom-up approach by linking current responsibilities to the priority. Alternatively, you can set goals by looking at the strategic priorities listed on the form and selecting relevant goals.

Examples of goals include launching programs or policies, managing resources (budgets, staffing, equipment), or building capacity through training or tools.

Ensure your goals are SMART:

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.

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T – Time-bound Includes a deadline for achieving the goal.

There is space on the PIDP form for three SMART goals, each with its own action plan. If you need additional goals, you can add another row or copy and paste the entire table to create more space. Use the checkboxes to indicate which strategic priority or priorities your goal aligns with. After selecting the relevant priorities, provide a brief description of your action plan for achieving the goal.

Example of goals at the beginning of the fiscal year:

SMART GOAL 1	Establish a healthy, safe and high-performing workplace that supports and develops our people by launching two social connection clubs/programs for staff across all portfolios (by Chief) by March 2028.	
Strategic Priority Select all that apply	☐ Connect every Islander to primary care ☒ Provide access to health care that meets or exceeds national standards	☐ Deliver One Island Health System with provincial programs delivering best practices ☒ Build a more connected health system, integrating care around Islanders
Action Plan	Gather data using an employee well-being survey to establish a baseline by May 30, 2027. Develop and launch a quarterly well-being dashboard by September 30, 2027 to track participation, satisfaction, and impact metrics across all departments. Work with team leads to launch and promote social connection clubs/programs for staff.	
Progress Notes	Outline successes, unforeseen barriers or priority shifts	
Target completion date: 31/03/2028		Completion date: DD/MM/YYYY Achievement Rating:

3. Review the Valued-Lead Framework/LEADS capabilities in Part 3 of the PIDP.

The LEADS in a Caring Environment framework is Health PEI's leadership model, outlining shared expectations for effective, people-centered leadership. It defines leadership as developable behaviours across five domains: **Leads Self, Engages Others, Achieves Results, Develops Coalitions, and Systems Transformation.**

At year-end, the manager will assess the employee on each capability.

4. Create a Personal Development and Learning Plan

A Personal Development & Learning Plan helps leaders identify meaningful learning goals and outline the specific initiatives they'll use to achieve them. Goals should strengthen professional effectiveness, build LEADS capabilities, support strategic and cultural priorities, and advance long-term career aspirations within Health PEI. Each goal should be paired with concrete learning activities and realistic timelines so progress can be tracked throughout the year.

Leaders should use a mix of learning methods, not just formal courses, to build skills in practical, flexible ways. A varied approach ensures development is relevant, applied, and sustained.

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Examples of initiatives to include:

- **Formal learning** — courses, workshops, conferences, certifications
- **Coaching or mentoring** — mentor check-ins, peer coaching
- **On-the-job learning** — stretch assignments, job shadowing
- **Self-learning** — books, webinars, podcasts
- **Real-world practice** — leading projects, piloting new processes

Example of a Personal Development and Learning Plan

Learning & Development Goal	Build capacity for leading digital transformation, including AI and data analytics in healthcare.	
Learning and Development Initiative(s)	Attend Data Analytics for Healthcare Summit and report back on sessions on AI ethics, predictive analytics and trends in digital health platforms.	Target completion date: 15/12/2027 Completion date: DD/MM/YYYY

THROUGHOUT THE YEAR

Effective managers provide ongoing feedback and coaching throughout the year. Regular one-on-ones, check-ins, and informal conversations help recognize achievements, address challenges early, and keep priorities on track—so there are no surprises at review time.

Use these discussions to adjust goals and update progress notes in your PIDP if needed, identify support needed, and reinforce progress. Focus on observable behaviours and outcomes, maintain a supportive, forward-looking tone, and treat these conversations as opportunities for development rather than for discipline.

Monitor and adjust goals

- Use planners and dashboards to monitor progress toward goals.
- Adjust goals in the PIDP as needed due to changing priorities or unforeseen barriers out of your control: note in the Progress Notes section of Part 1 of the PIDP form.
- As goals are completed, note the date on the PIDP.
- Outline barriers, challenges & successes in the progress notes section.

Keep conversations supportive and focused on growth

- Be clear, constructive, and timely when addressing challenges. Listen actively and ask open-ended questions.
- Recognize both strengths and improvement areas. Celebrate milestones and recognize achievements.

Recognize effort and impact

Recognizing effort and impact – whether the employee consistently exceeds expectations or is making meaningful progress in their development – reinforces desired behaviours and outcomes and cultivates a culture where individuals feel seen, valued, and motivated to grow. This in turn drives engagement, boosts morale, and supports retention. **See Appendix A for recognition ideas.**

CONDUCT AN ANNUAL REVIEW AT THE END OF THE FISCAL YEAR

At the end of the fiscal year (in March), the manager and employee complete the PIDP.

Part 1 of the PIDP: Information

Review the identification fields in Part 1 of the PIDP to ensure they are still accurate. Make any required changes as needed.

Part 2 of the PIDP: Strategic Objectives and Goals

The employee notes the completion date for any goals not already marked as completed.

The manager then rates the completion with one of the following ratings:

Exceptional (E)	Demonstrates consistently outstanding performance with a level of quality, impact, or contribution well beyond what is expected.
Exceeds (X)	Demonstrates strong, reliable performance that is above expected standards.
Delivers (D)	Demonstrates consistent, dependable performance that meets expected standards.
Developing (DV)	Demonstrates partial or inconsistent performance relative to expected standards.
Did Not Deliver (N)	Performance does not meet expected standards.

See Appendix B for suggestions on addressing poor performance.

Watch for these common biases when delivering the annual review.

1. Recency Bias – Managers weigh recent performance too heavily and forget earlier contributions or issues.
2. Halo/Horns Effect – One strong positive or negative trait overly influences the entire evaluation.
3. Leniency/Strictness Bias – Some managers rate too generously, while others are consistently too harsh.
4. Central Tendency Bias – Rating most employees as “average” to avoid difficult differentiation.
5. Confirmation Bias – Looking for evidence that supports an existing opinion rather than evaluating performance objectively.

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These tend to show up most often because they're tied to common human tendencies: memory shortcuts, first impressions, and discomfort with difficult conversations.

Example of a completed form after the annual review

SMART GOAL 1	Establish a healthy, safe, and high-performing workplace that supports and develops our people by launching two social connection clubs/programs for staff across all portfolios (by Chief) by March 2028.	
Strategic Priority Select all that apply	☐ Connect every Islander to primary care ☒ Provide access to health care that meets or exceeds national standards	☐ Deliver One Island Health System with provincial programs delivering best practices ☒ Build a more connected health system, integrating care around Islanders
Action Plan	Gather data using an employee well-being survey to establish a baseline by May 30, 2027. Develop and launch a quarterly well-being dashboard by September 30, 2027, to track participation, satisfaction, and impact metrics across all departments. Work with team leads to launch and promote social connection clubs/programs for staff.	
Progress Notes	I was successful in collecting data to establish a baseline of employee well-being. We had a high response rate. The launch of the quarterly well-being dashboard is complete. Leadership changes within teams have made it difficult to establish social connection clubs. We have been able to get some teams onboarded and so far, there is a high satisfaction rate.	
Target completion date: 31/03/2028	Completion date: Ongoing	Achievement Rating: D

See Appendix B for suggestions on addressing poor performance.

Part 3 of the PIDP: Values-Led Capabilities (LEADS Framework)

The manager evaluates the employee's performance on each of the LEADS capabilities listed with the rating scale on page 6. When assigning the rating, watch for the common biases outlined on page 6 of this guide.

See Appendix B for suggestions on addressing poor performance.

Part 4 of the PIDP: Personal Development and Learning Plan

The employee updates their PDLP with progress toward their competency and strategic learning goals, as well as their career development goals.

Part 5 of the PIDP: Annual Review

At the end of the cycle, the manager assigns an overall performance rating (using the same rating scale used for the strategic goals and values-led capabilities) and provides summary feedback on achievements.

The employees reflect on their professional impact, accomplishments, and opportunities for growth, and indicate their agreement or disagreement with the professional impact and development review, the overall rating, and the information recorded in this form.

The manager and leader then sign off with their names, signatures and the date of the final review.

Part 6: The Final Step

Once the PIDP has been completed for the fiscal year, the manager puts it in a sealed envelope and sends it to their employee services assistant (ESA) for the employee's file.

Frequently Asked Questions

Where can I find the PIDP form?	The PIDP form can be accessed on the Professional Impact and Development page on the Staff Resource Centre.
I am a manager, but I don't have direct reports. Should I participate in a PIDP?	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 participate in the PIDP at this time.
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.
When will the current staff forms and process be updated?	This will be done in collaboration with union partners and other stakeholders. The timing is to be determined.
How do I manage the professional impact and development process for direct reports on leave?	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. 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.
How much time does annual planning require?	In general, if you are preparing your plan before meeting with your manager, block 2 to 3 hours to determine objectives, set SMART goals, and develop your Professional Learning and Development Plans. Managers should set aside 45 to 60 minutes to review the plan and another 60 minutes for the planning meeting. If the manager and employee decide to fill out the blank plan together, the process may take up to three hours.

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	Plans with more than 10 objectives may take longer or require multiple meetings.
What if the timeline does not work for me (e.g., due to heavy high-priority work at the same time)?	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.
How should I treat multi-year goals?	Break multi-year goals down into annual goals. Note on the PIDP form that the goal is part of a multi-year project, process or initiative.
Can we use electronic signatures?	Yes, electronic signatures are acceptable.
Who schedules the meetings for performance planning, check-ins, and the annual review?	The employee and manager should coordinate review and meeting times jointly.
Is pay tied to performance?	No. The Professional Impact and Development process is a tool to help you 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 in PeopleSoft. You, your manager, your employee services assistant and your human resources manager will have access to this information.
Who should I contact for more support?	Contact the Learning and Development team at learning@ihis.org .

Appendix A: Recognizing employee performance

Match recognition to performance level to reinforce behaviours, motivate growth, and sustain engagement.

Below are some ideas to recognize the various performance ratings but be sure to **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 others may be at capacity and prefer an opportunity to step away to an off-site conference or course.

Exceptional Performance: Consistently exceeds expectations with outstanding results and impact. Recognition reinforces excellence and motivates others.	
When: After major achievements, project completions, or reviews.	Ideas: • Public recognition (meetings, newsletters, media) • Leadership thank-you notes • High-visibility projects • Professional development or awards
Exceeds Expectations: Regularly goes beyond expectations; strong performance across areas. Recognition supports retention and engagement.	
When: During reviews, after key milestones, or sustained high performance.	Ideas: • Team shoutouts or emails • Mentoring opportunities • Stretch assignments • Lunch with leadership or certificates
Meets Expectations: Reliable performance with occasional above-average results. Recognition maintains morale and consistency.	
When: Ongoing, especially after completing a solid task.	Ideas: • Positive feedback and check-ins • Team acknowledgment • Small leadership or initiative opportunities • Peer recognition
Developing Performance: Progressing but still has gaps to address. Recognition builds confidence and supports growth.	
When: After visible progress or skill development.	Ideas: • Coaching and encouragement • Celebrating small wins • Incremental responsibilities • Learning and mentorship opportunities

Appendix B: How to address poor performance

Managing Performance Challenges

Address performance issues early to build accountability, support growth, and keep team goals on track. Focus on helping employees succeed through a fair, consistent approach aligned with HR policies and agreements.

1. Identify and Document

- Assess performance regularly using data, feedback, and observation.
- Note gaps between expectations and results.
- Document specific incidents with facts, dates, and impact.
- Use objective, unbiased language and apply consistent standards.

2. Provide Feedback

- Hold private, respectful conversations.
- Use a coaching mindset focused on improvement.
- Clearly explain issues, impacts, and expectations.
- Listen to the employee and collaborate on solutions.
- Document key points and agreed actions.

3. Support Improvement

- Create a short-term plan with clear goals.
- Provide training, tools, and regular check-ins.
- Monitor progress and adjust support as needed.
- Keep records of meetings and outcomes.

4. Escalate if Needed

- Use a Performance Improvement Plan (PIP) if improvement isn't sustained.
- Consult your human resources manager before using a PIP. They will guide you.
- Stay professional, supportive, and well-documented throughout.

Bottom line: Early action, clear communication, and consistent support drive performance improvement and long-term success.