Annual Senior Executive Performance Review

**Date:**

**Name:**

**Position:**

# **Section 1: Prior Year Achievements & Progress Toward Established Goals**

Achievements

*(for each provide a brief description along with the expected impact)*

Progress Toward Established Goals

*(for each provide a brief description of goal, current status, expected timeline for completion, resources required [if any] for completion)*

# **Section 2: Goals**

List goals that are being carried forward followed by new goals for the coming year

*(for each provide a brief description of goal, expected impact, expected timeline for completion, resources required [if any], and any other relevant information)*

**Section 3: Equity, Diversity, and Inclusion**

*Describe activities undertaken in the past year to address EDI issues in your areas of responsibility. Describe plans for the coming year to address EDI issues in your areas of responsibility.*

**Section 4: Indigenization**

*Describe activities undertaken in the past year to address Indigenization in your areas of responsibility. Describe plans for the coming year to address Indigenization in your areas of responsibility.*

**Section 5: Other matters requiring discussion**

# **Section 6: Professional Development Considerations**

# **Section 7: Declaration of Conflicts of Interest**

**Section 8: Declaration of Outside Professional activities**

# **Section 9: Closing Comments and Signatures**

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# Senior executive closing comments

# President’s comments

# **Signatures**

Executive:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

President: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Appendix: Succession planning for leadership positions within your portfolio

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| --- | --- | --- | --- |
| **Position** | **Current**  **Leader** | **End date**  *(known or projected)* | **Succession Plan**  *(e.g., internal candidates, search required, etc.)* |
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