



Looking Back: The Annual Performance Assessment Meeting:

Following the completion of the *Annual Year-End Performance Assessment Form*, managers meet with their staff to share their comments and performance evaluation. The purpose of the meeting is to provide feedback to help staff succeed and achieve higher outcomes.

In order to maximize the learning opportunities from this conversation, managers will provide feedback that is:

- **Balanced** – It is important to recognize both the accomplishments and opportunities for growth and development
- **Intentional** – Encourage a specific outcome and show support and optimism that growth is achievable
- **Conversational** – Both parties provide feedback and openly discuss opportunities for growth

A sample of questions is provided below to facilitate this conversation:

- [accomplishments] - What are you most proud of? What goals and priorities did you make great progress on?
- [what could have gone better?] - What did you learn from this experience and how would you have handled the situation differently?
- [challenges] - How can I best support you with the challenges you face in your job?



Goal Setting Exercise

After reflecting on the previous review period, it is important to continue the conversation by brainstorming goals for the next review period and beyond. You will submit **Job-Specific Goals** and **Developmental Goals** at the start of each review period.

Job-Specific Goals help achieve more optimal outcomes in your work, and should be aligned with departmental goals.

Developmental Goals are related to the individual and focus on developing or enhancing skills and competencies

Managers will share their goals and priorities with their team(s) and will support their staff in aligning their individual goals with departmental / University goals and priorities.

When brainstorming goals for the next review period, it is important to ask yourself, is this goal:

Specific (simple and clear)

Measurable (meaningful and results-oriented)

Achievable (attainable and realistic)

Relevant (goal alignment and meaningful)

Time bound (time-based, target deadline, time-sensitive)



Continuing the Conversation

Remember that Performance and Development is an ongoing cycle, thus **regular check-ins** are needed to stay focused and track progress. A lot can change throughout the year, thus it is important to be flexible and realign goals as needed. The **Mid-Year Review** provides an opportunity to look back at the goals you set at the beginning of the review period and evaluate your progress. Questions you can ask throughout the year to assess progress include:

- Are you on track with your goals for this review period?
- Do you think your goals and priorities have shifted?
- Do you have the resources needed to accomplish your goals?
- What are the biggest challenges you expect to face in accomplishing your goals?
- Is there anyone within the organization you can learn from or collaborate with to help achieve your goals?

Take the time to ask these questions regularly, regardless of how busy you get with the day-to-day operational needs.

Employees and managers should openly share feedback with one another to ensure their priorities are aligned.

To ensure you are providing effective feedback, you can reference the **3 F's of Feedback** and ask the questions below:

Fair – Would you provide the same feedback to others? Are your expectations realistic and consistent?

Focused – Can you clearly identify the situation, and the successes or area(s) for improvement?

Frequent – Have you had past conversations around this topic?