



SUPERVISOR MID YEAR CONVERSATION GUIDE

PURPOSE:

Use this tool to plan for, prepare, and discuss employee performance in the middle of the year (typically December-January).

PLAN AND PREPARE

1. Review the goals established for each employee
2. Assess progress against each goal and document examples, feedback, and/or input from co-workers, clients, and colleagues
3. Consider what has helped the employee achieve goals and what things might be getting in the way
4. Ask each employee to come prepared to discuss progress towards goals, input from colleagues, what is helping/getting in the way of achieving goals, and what kinds of professional development may be of interest
5. Schedule the conversation

MEET WITH THE EMPLOYEE

1. Have a copy of the goals ready for review or have the goals pulled up in UR Talent Web
2. Start the conversation by getting input from the employee
3. Review each goal and discuss
 - a. What is going well? What progress have you made? What is helping to achieve the goal? What, if anything, is getting in the way?
 - b. How might the ratings behavioral examples apply to the goal?
4. Determine if any goals need to be changed or updated
5. Discuss professional development interests and needs
6. Align expectations on actions for the remainder of the year

FOLLOW-UP

1. Document updated goals and changes in UR Talent Web
2. Include comments on the outcomes of the discussion in the comments section
3. Review professional development options, such as courses offered by HR in UR Talent Web, Executive Education, and SPCS courses
4. Continue to check in on progress regularly throughout the year

MID YEAR CHECK IN CONVERSATION

PREPARE

- Ask employee to review goals and come prepared to discuss progress
- Ask employee to think about appropriate professional development interests
- Review goals established at the beginning of the year and determine progress made to date
- Gather any documentation on progress (i.e. emails, metrics, data, feedback, project documents, etc.)
- Schedule the conversation

DISCUSS

- Start the conversation by seeking input from the employee
 - What accomplishments are you most proud of so far this year?
 - What has helped you accomplish the goals?
 - Is there anything getting in your way of accomplishing the goals?
- Review each goal and share your feedback
 - Be direct, specific, and concise
 - Share your input on what is going well and what areas may need coaching and support (i.e. state your expectations, your observations, and any feedback you have from others).
- Determine if goals need to be updated, revised, removed, or added
- Discuss professional development
 - Based on your career goals, the work you're currently doing, and projects you need to get done, what kinds of professional development are you interested in?
 - What courses and programs are available through HR, Executive Education, and SPCS that might apply to your interests?
- Align on expectations for the remainder of the year
- Determine how UR Talent Web will be updated to reflect the conversation
 - Tip: employees are encouraged to update any revised goals, while supervisors should add comments to reflect the outcomes of the conversation