



SUPERVISOR END OF YEAR PERFORMANCE REVIEW CONVERSATION GUIDE

PURPOSE:

Use this tool to plan for, prepare, and discuss employee performance at the end of the year.

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. Document progress made against each goal in UR Talent Web. Assign an overall rating, include overall comments on performance, sign, and submit in UR Talent Web.
6. The employee will go into UR Talent Web, review your comments, have the opportunity to include their own comments on performance, sign and submit.
7. Schedule the conversation

MEET WITH THE EMPLOYEE

1. Have a copy of the performance review for the employee
2. Start the conversation by getting input from the employee
3. Review each goal and discuss
 - a. What went well this year? What progress did you make on each goal? What helped to achieve the goals? What, if anything, got in the way?
 - b. How might the ratings behavioral examples apply to the goal?
4. Share your honest assessment of the employees' performance for the year. Discuss both areas of accomplishment as well as any areas that require focus, attention, coaching, or development.
5. Share the overall performance rating.
6. Discuss professional development interests and needs

END OF YEAR PERFORMANCE REVIEW CONVERSATION

PREPARE

- In UR Talent Web, review each goal, comment on accomplishments and areas of focus
- Assign an overall performance rating
- Sign and submit in UR Talent Web
- Ensure that the employee goes into UR Talent Web to review your comments, overall rating assigned, and includes his/her own comments on performance. The employee must also sign and submit in UR Talent Web to complete the system process.
- Gather any documentation on progress (i.e. emails, metrics, data, feedback, project documents, etc.)
- Print two copies of the review
- Schedule the conversation

DISCUSS

- Start the conversation by seeking input from the employee
 - What accomplishments are you most proud of this year?
 - What helped you accomplish the goals?
 - What, if anything got in your way of accomplishing the goals?
- Review each goal and share your feedback
 - Be direct, specific, and concise
 - Share your input on what went well and what areas need coaching and support (i.e. state your expectations, your observations, and any feedback you have from others).
- Share the overall rating
- 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?
- Share the timeframe to establish and create goals and expectations for the upcoming performance year