

Preparing for the Annual Performance Dialogue

Staff Checklist

- Review previous performance evaluations. Have you met your goals? What progress have you made toward meeting them? What were the difficulties in carrying them out? Do some need to be carried over to the coming year, or do they need to be revised to meet current job responsibilities?
- Review a blank Performance Dialogue form to familiarize yourself with the categories to be reviewed.
- Be prepared to point out what you see as your accomplishments during the past year.
- Set goals for what you want to accomplish or would like to improve during the next year. This should include professional goals—those that will meet the department's needs—and also personal goals. You should also indicate how you might meet these goals (cross-training, courses, etc.)
- Review your job description and note where it needs to be updated.

During the Performance Dialogue

- Be on time for the meeting.
- Pay close attention to what your supervisor says and what you say. Take notes.
- Paraphrase what the supervisor says, so you both will be certain you understand.
- Take responsibility for what is discussed.
- Ask questions to clarify. Schedule another meeting if you need more time to fully understand what your supervisor is saying or to clear up differences.
- Ask for specifics if the supervisor is talking in generalities (ask for examples on how to improve).
- Review your job responsibilities and

Supervisor Checklist

- Review documentation compiled over the period to be reviewed
- Use a university-approved performance dialogue form.
- Review the job description with the staff member to ensure that it is current.
- Be sure the goals/expectations are stated in realistic, attainable, measurable terms.
- Include opportunities for training/development. Include short and long-term goals.
- Be specific. Include documented facts about the staff member's work throughout the year. Be sure to include special projects or committee work, team efforts, outstanding accomplishments, poor performance issues, attendance, etc.
- After the appraisal is completed in draft form, review it with your supervisor, unit director, and/or human resource representative to ensure general agreement before sharing it with the staff member.
- Explain the appraisal process, the staff member's role in participating, and share the draft appraisal with the staff member (there should be no surprises).
- Give the staff member a copy of the Staff Checklist for preparing for performance dialogues.

Scheduling the Performance Dialogue

- The dialogue should be scheduled annually.
- Schedule a specific time for the dialogue in a setting that will ensure privacy without interruptions.
- Allow sufficient time to thoroughly cover the material; permit staff response and questions. During the Performance Dialogue
- Be on time for your scheduled meeting(s).
- Review the purpose of the dialogue.
- Proceed with the dialogue, giving the staff member opportunities to respond/participate. Conduct the review as an exchange of information.
- Include discussion of strengths, areas in need of improvement, and future development.
- Conclude with a summary of the dialogue and

(over)

discuss any changes in your job description.

- Working together, set goals and target dates for their completion. Plan steps to take toward achieving the goals.
- Discuss suggestions for developmental activities (e.g., classes, new assignments).
- Ask for a copy of your Performance Dialogue form to take with you to consider before commenting and signing the original.

After the Performance Dialogue

- Make notes immediately after the meeting of your discussion in order to follow up, if desirable or necessary.
- Review your Performance Dialogue form. Make appropriate comments on the original, sign, make a copy for yourself, and return to your supervisor. If you disagree with something or want to clarify something, be sure to state this in the comments.
- Schedule a follow-up meeting if you later have questions about what was discussed.
- Keep personal file copies of your evaluation forms.

Throughout the Year

- Continue discussion with your supervisor about your job responsibilities and how they have changed.
- Periodically check your progress on your goals.

plans that have been made. End on a positive note.

After the Performance Dialogue

- Offer the staff member an opportunity to make written comments on the dialogue form.
- Secure the staff member's signature and the required supervisory signatures.
- Give a copy of the completed form to the staff member.
- Forward the completed original for central department records.
- Schedule follow-up activities, training, or meetings concerning ongoing performance and development.

Throughout the Year

- Provide continuous coaching and opportunity for open communication during the year.
- Routinely review the goals/expectations. Revise.