

GETTING READY FOR A PERFORMANCE CHECK-IN: STAFF

It's time for you and your manager to discuss what you've accomplished during the review period (and for the midpoint, what you plan to do for the remainder of the time). This discussion should summarize milestones, identify any goals that were added, removed or changed, review priorities, and clarify expectations going forward. The check-in is an opportunity to focus on your growth.

EMPLOYEE GUIDELINES

PREPARE A LIST OF WHAT YOU WANT TO COVER

- Submit your self assessment in Talent@GW. Be sure to include current milestones for your goals starting from the beginning of the performance year.
- Consider which goals might need to be updated if priorities have changed. Work with your manager before the check-in to add or edit goals. For the final check-in, bring draft goals for the coming performance year.

MEET AND DISCUSS PERFORMANCE TO DATE

- Ask for feedback from your manager on what you are doing particularly well and what you might improve upon.
- Reflect on your goals/priorities as well as the performance factors that are critical to your success. Provide your manager with specific examples of what you've done particularly well and where you would like to improve.
- Make the discussion easier by asking questions like, "What else can I do to be more effective?" or "Do you have any suggestions for me?" Then listen carefully.

DISCUSS PLANS AND CLARIFY EXPECTATIONS

- Structure goals to be SMART to aid in clarity and make feedback more applicable and easier to incorporate.
- Ask questions to clarify your and your team's priorities.
- Make your manager aware of any issues or roadblocks you are facing and discuss how they might be overcome.
- Let your manager know what support you need to be successful in achieving your goals. Consider timeframes, resources, and stakeholder input your manager can help provide input for.

DISCUSS YOUR DEVELOPMENT FOR THE YEAR

- Plan in advance for your conversation - what skills do you want to develop?
- Discuss with your manager ways you would like pursue those skills, for example, by learning a new system, participating in a new initiative, or shadowing someone.
- Ask for coaching and find out how your manager can support you in your professional development. Focus on specific topics for feedback and ask for the help you need.

GETTING READY FOR A PERFORMANCE CHECK-IN: MANAGERS

It's time for you and your team to discuss their accomplishments (and for the midpoint, what they plan to do for the remainder of the time). This discussion should summarize accomplishments to date, identify any goals that were added, eliminated or changed, review priorities, and clarify performance expectations going forward. Check-ins are an opportunity to focus on professional development.

MANAGER GUIDELINES

PREPARE FOR THE PERFORMANCE CHECK-IN

- Review your files of what has been accomplished to date. It helps to maintain an updated file for each of your direct reports. Track feedback and recognition received from relevant stakeholders.

SCHEDULE THE MEETING WHEN YOU SUBMIT THE MANAGER REVIEW IN TALENT@GW

- Plan for one hour. Once scheduled, avoid moving or cancelling the discussion. Demonstrate that you consider the check-in to be a priority.

MEET AND DISCUSS PERFORMANCE TO DATE

- Share with the employee your view of the progress made on goals/priorities and be clear about what goals/priorities you'd like them to focus on for the future.
- Provide specific examples of what the employee is doing particularly well, and examples of anything that could be done differently to be more successful.
- Ask the employee how their work is going. Questions like "What's going well?" and "What needs to be improved?" can foster a productive conversation about the work and their performance.

LEVEL-SET ON EXPECTATIONS

- Agree on what goals/priorities are most important for the remainder of the performance cycle (midpoint) or the coming year (final). Ensure a shared understanding of performance expectations to minimize surprises for either you or your employee.
- Explore any challenges or roadblocks the employee is concerned about. Ask how you can help eliminate roadblocks and then follow through.
- Discuss what you can do to support their development. Ask about long-term career aspirations and what keeps them engaged in their role.

COMPLETE THE DISCUSSION

- Thank the employee for their hard work and agree on any follow-up actions.
- Bring ideas for continued growth in your employee's areas of interest (participating in new priorities, leading a project, learning a new system, planning an event) to your next 1:1 to encourage engagement.