

Information for officer of administration managers and supervisors: Conducting a performance review conversation

The following suggestions are offered to help managers and supervisors prepare for their performance review conversation with an officer of administration (OA).

Plan ahead:

- A few weeks before the review meeting or conversation, set the date and time and ask the OA to provide you with the completed self-assessment form. If you are planning on getting input from the OA's peers and/or subordinates, ask for the feedback via the third-party form provided on the HR website or in telephone or e-mail requests.
 - Please note the current specific requirements for including this feedback. It is a good idea to make sure that the OA knows at the onset of the year that you intend to ask others for feedback when you are assessing performance.
- Be consistent in your practice for those in your workgroup with similar responsibilities.

Prepare the written review:

- Evaluate the OA's performance over the past year using the job description or portfolio of responsibilities, the goals that were set at the time of hire or at previous reviews, input from peers and/or subordinates, and, if applicable, the self-assessment form completed by the employee.
- Depending on the review format you have chosen or developed, prepare your assessment of the OA's performance, with a primary emphasis on the OA's degree of success meeting job goals and objectives. Other criteria to consider are:
 - Contributions to the department or college and the university mission during the review period;
 - Support for university initiatives, such as diversity planning, and expectations regarding ethical leadership and stewardship;
 - Leadership effectiveness (for supervisory personnel);
 - Support of and collaboration with colleagues;
 - Growth and development accomplishments and opportunities;
 - Suggestions for the new year's goals, objectives and professional development (including training).
- If applicable, any areas where improvement is needed should be noted, along with examples of deficient performance or behavior.

Set the tone for the meeting:

- Choose a time and place that is conducive to a meaningful conversation.
- Be sure to set aside sufficient time.
- Eliminate distractions and interruptions, turning off phone, pages and mobile devices.

Lead with the positive in the face-to-face meeting:

- Take time to think about and write down the most important contributions and accomplishments of the staff member during the year.
- Note the staff members' attributes and behaviors that contribute to the effectiveness of the team or the work unit.

Conducting a performance review conversation

- Acknowledge and thank the staff member for his/her contributions to the team, the department or work unit and to the university in general.
- Review the OA's self-assessment (if provided) and the written review.
- Have a two-way dialogue. An effective performance review requires an interactive discussion with an open agenda. Solicit the OA's opinions and listen carefully.
- Ask the OA to voice any concerns. Discuss any issues that are most important to the OA.
- If areas for improvement are noted, be prepared to offer suggestions or support for improvement, such as training or mentoring.
- Discuss, develop, and come to agreement on goals, including both annual work goals and professional development and training goals.
- Ask what the OA needs from you in the form of professional support to be successful.

Finalizing the review process:

- Be open to revising the review based on the review conversation and the OAs feedback.
- Once any agreed-upon adjustments have been made to the written review, sign the review and ask the OA to sign.
- Give the OA an opportunity to provide a written statement or rebuttal to be added to the file.
- Give the OA a copy of the signed review.
- Forward a copy of the review and any supporting documents (e.g. self assessment, rebuttal, etc.) to your supervisor if he or she wants to see performance reviews and to your departmental HR/payroll representative.