PREPARATION FOR THE ANNUAL REVIEW & DEVELOPMENT PLAN MEETING

REVIEWER’S GUIDELINES

Having discussions with employees is a vital aspect of a reviewer’s function and has a significant influence on the effectiveness and productivity of the employee’s performance.

The sign of a successful Annual Review & Development Plan is an employee who leaves the meeting feeling motivated and excited about his or her job. If your employee feels acknowledged, appreciated, and empowered to do their best, he or she will be a valuable asset to the success of the department.

Procedures

- Ask the employee to self-evaluate and provide their feedback to you in advance (within 2 weeks) the purpose of completing the self-assessment portion is to encourage communication and to provide an opportunity for the employee to have input into the performance assessment.

- Review the employee’s job description and primary responsibilities (if it is inaccurate, this is the best time to update).

- Review the employee’s past Annual Review & Development Plan including the goals set for the employee.

- Identify differences between your review of the employee and their self-evaluation.

- Evaluate performance. Use clear, brief, specific language and examples.

- Within ten (10) working days of the review meeting, document all points covered, especially those relating to the agreed-upon goals as well as any important performance issues discussed.

- Ensure you provide a copy of the Annual Review & Development Plan to the employee and submit the original to Human Resource Services.
Setting the Stage

- Put the employee at ease by creating an open atmosphere for joint discussion.
- Schedule the session in a confidential location with no opportunities for interruptions. If it has to be in the reviewer’s office, be sure both the employee and reviewer sit in front of the desk not across the desk from each other.
- The meeting should be completed within 1 hour (approximately) and end on a positive note.
- There should be no surprises during the review. Do not raise issues/concerns that the employee has not already been made aware of. Regular feedback with your employee throughout the year is essential.
- Develop open ended questions to engage the employee in the review session and encourage a two way conversation; e.g., “What additional support do you need to be more successful in your role?”

The Meeting

- Focus on job-related observed behaviors such as those related to the job description, performance standards, and accomplishments.
- Make performance challenges an opportunity for learning and development, as opposed to simply pointing them out.
- Give the employee context for their performance by discussing impact of both their positive and negative performance.
- Indicate how the employee contributed to the success of his/her unit, and toward the strategic goals and objectives of department. Examples of special assignments or responsibilities the employee assumed during the year may be included.
- Identify career development opportunities for the employee.
- Help the employee set job-related SMART goals that can be accomplished within a year.
PREPARATION FOR THE ANNUAL REVIEW & DEVELOPMENT PLAN MEETING

EMPLOYEE’S GUIDELINES

Having discussions with your reviewer has a significant impact on the effectiveness and productivity of your performance and development plan.

The sign of a successful Annual Review & Development Plan is an employee who leaves the meeting feeling motivated, engaged, and excited about his or her job. You will feel acknowledged, appreciated, and empowered to do your best.

As a University of Manitoba staff member, you are an equal partner in the Annual Review and planning process. You will need to take time to reflect upon, and be ready to actively participate in your review. Some key ideas to help you prepare are listed below:

- Review your job description and primary responsibilities (if it is inaccurate, this is the best time to update).

- Review your past Annual Review & Development plan including the goals set for you. Self-assess personal performance against the goals from last year and against the competencies listed.

- Submit the assessment to your supervisor as directed prior to your annual review. The purpose of completing the self-assessment portion is to encourage communication and to provide an opportunity for you to have input into the performance assessment.

- Prepare a list of your questions, and/or topics to be addressed during the annual review session.

- Prepare goals and/or professional development for the upcoming year.