Performance Conversation Guide for Reviewer

Managing performance is an ongoing process of discussion, review, feedback and development. Performance review processes are a way to formally capture the conversations and actions you've had and made with staff throughout the period and record information regarding the outcomes they've achieved. The formal review process is a time to review objectives to ensure they are still relevant, and the staff member is on track to achieving them.

If performance has been managed effectively throughout the period, there will be no surprises for staff in these formal processes. As the manager, you are responsible for recognising and reinforcing strong performance in your staff and identifying improvements where required.

Step 1: Before the Conversation

- ❑ Request that the individual prepare for the process by reading the Performance Conversation Guide for Staff
- ❑ Ask the individual to complete their self-assessment
- ❑ Schedule meeting with each individual – in a private location allowing sufficient time for the conversation (recommend minimum one hour)
- ❑ Ask the individual to come prepared to discuss their own assessment of performance
- ❑ Review progress towards objectives and details of regular feedback and conversations with everyone. Reflect and write notes on:
  - Key achievements
  - Specific examples of values demonstrated
  - Areas where performance could benefit from further development and relevant opportunities for development
  - Areas of concern or future challenges
- ❑ Decide on key messages and feedback you want to provide (support these with specific examples)
- ❑ Create a list of open-ended questions to invite input
- ❑ Anticipate possible reactions and plan accordingly

Step 2: During the Conversation

Opening the conversation:

- ❑ Create a positive environment – remove distractions, ensure it's at a suitable time of day, welcome the individual and make them feel at ease
- ❑ Set the scene for the conversation
  - Explain the importance and benefits of the review process
  - Express your desire for a two-way conversation
- ❑ Provide an overview of what you will discuss:
  - Objectives and achievements to date
  - Values demonstrated
  - Successes (recognise key achievements)
  - Anything that may be standing in the way of achieving better outcomes
  - Opportunities for development

Review performance objectives:

- ❑ Focus on listening, maintaining appropriate eye contact and asking open-ended questions. Paraphrase and summarise throughout the conversation
- ❑ Ask them to discuss their achievements relating to each objective
  - Listen and offer your perspective with specific examples (successes/challenges/improvement opportunities)
- ❑ Ask them to discuss their strengths
  - Provide recognition and specific examples of demonstrated strengths
- ❑ During the conversation allow time for them to digest your feedback and to ask questions
  - Listen and explore paying attention to tone, facial expressions and body language

Discuss & agree future objectives and development plan:

- ❑ Plan performance objectives for the following year in line with University of Galway and School/Unit Strategy and Values
- ❑ Ask the individual about their development and career aspirations
- ❑ Discuss how you can best support their performance and development
- ❑ Ask what you could start/stop/continue to do which would help them achieve their objectives – this is a great opportunity for you to be a role model for seeking feedback

Close conversation:

- ❑ End on a positive note – thank and recognise their efforts
- ❑ Express optimism regarding future performance

Step 3: After the Conversation

- ❑ Schedule regular individual discussions