

Prep for the Mid-Year Review Conversations



Direction for use: Supervisors should use this handout to prepare for the Mid-Year Review with their employees. They may also use it during the Mid-Year Review Meeting to help guide the conversation.

Context: The Mid-Year Review is an opportunity for Supervisors and Employees to meet, discuss progress in performance and review or revise their individual goals. As a supervisor, you want to engage in proactive discussion and support around Core Competencies and SMART Goals.

- **Competencies:**

- Ask the employees:
 - “Do you have any questions about expectations in these competencies?”
 - “Do you have any areas that you find more challenging and want support around?”
- Give the employee feedback in the competencies:
 - **For example:** “I really appreciate the way that you communicate in-person and electronically. You are also quick to follow-up and ensure everyone involved is on the same page.”
- Review any areas you think the employee needs development and support in, from your managerial perspective:
 - **For example:** “I’ve noticed that sometimes when demands at work change, you seem overwhelmed. How can I support you when this happens?”

Reminder: disciplinary actions are handled outside of the performance appraisal process.

To prepare for discussing competencies: for each employee, complete the following table by reviewing the [employee competencies](#):

Employee Name: _____

Positive feedback regarding areas of the competencies (with examples):

Areas for development and support in the competencies (with examples):

- **SMART Goals:**

- **Review** employee's goals from the initial plan (you should have received a copy of these in the body of the reminder e-mail from appraisal_no-reply@occc.edu)
- **Ask** for progress updates for each goal
 - **For example:** "Have you experienced any challenges in your goal progression?"
- **Ask** if they need to revise any of the goals
 - **For example:** "It sounds like you may need to revise goal #1 based off our conversation about roadblocks and resources. What do you think about changing it?"
- **Help** them revise the goal (even if they came prepared with revision) by changing the scope, the deadline, or the focus, if needed.
 - Look over revised version and add feedback if needed
 - **For example:** "It looks like you may need to change the timeline on this goal to make it more attainable. Let's go ahead and do that."
- **Ask** how you can support the employee's attainment of goals.
 - **For example:** "What do you need from me in order to help you reach these goals?"

Tip: An employee who had a change in role or supervisor, may need to revise goals based on their new position or your feedback on their original goals.