

## **2019 Interim Performance Reviews**

### **Conducting Interim Reviews: Tips for Supervisors**

#### **Understand the Rationale**

- We are establishing a new timeframe for our performance management process based on the academic year calendar.
- Interim performance reviews are a means to discuss with staff members their progress on goals and performance since their most recent evaluation given at their most recent anniversary or October 2018.
- Conducting an interim review allows supervisors a formal opportunity to check in with their staff members for a few purposes, including the following:
  - Provide positive feedback on work to date or accomplishments and constructive feedback on areas where performance may be lacking.
  - Discover and eliminate possible roadblocks that may hinder staff member's performance, development plans, or prevent the staff member from achieving the set goals.
  - Adjust goals if organizational or departmental needs have changed since the most recent evaluation.
  - Discuss staff member satisfaction and head off issues for valuable staff.
  - Provide time for manager/staff member exchange of ideas.

#### **Understand the On Base Process Interim Reviews**

- On Base Process starts with email invitation to the Supervisor- Supervisor WILL NOT get individual "you have something to review" links for each staff member; a weekly emailed link will display all Evaluation forms ready for your review. This link will also be available from within Banner Self Service.
- Supervisor will type in comments in 3 free-form text boxes and a Goals section
  - Staff member's Professional Growth comments imported from 2018
  - Supervisor-defined Goals imported from 2018
  - Goals can be adjusted; supervisor can add/edit/delete and/or change due dates. The target dates for goals should now be in the 2020 academic year.
- Supervisors can (optionally) send a read-only preview to staff member before their sit-down meeting (NEW in this iteration)
- Click "I'm Finished" to review with staff member- the form is still editable until conversation is complete.

#### **Preparing for Interim Reviews**

1. Schedule the Interim Review Dialogue
  - a. At least one week prior to the date set for the Interim Review, the Supervisor should notify the staff member of the purpose of the meeting.
  - b. Explain that the purpose of the Interim Review session is to review performance expectations and/or job responsibilities, and update the goals that will be assessed in the new performance management cycle. Talk about "how things

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have been going" with performance and goal achievement, and identify any steps that can be taken to facilitate development.

2. Prepare for the Interim Review
  - a. Review performance expectations and/or job responsibilities in relation to the key performance indicators.
  - b. Examine notes or other information on performance results since last annual performance review.
  - c. The Supervisor should consider how factors outside of the staff member's control may or may not be facilitating progress.
3. Complete preliminary draft of review form using notes
  - a. Each comment box must have some data.
  - b. Save regularly.
  - c. Click "I'm Finished" when done.
  - d. Supervisors can (optionally) send a read-only preview to staff member before their sit-down meeting.
4. Conduct the Interim Review Meeting
  - a. Confirm the staff member's understanding of the purpose of the Interim Review.
  - b. Ask the staff member for a verbal self-assessment. The Supervisor should add his/her perspective, sharing observations.
  - c. Share your comments from review with staff member.
  - d. Reinforce (positively) favorable performance and accomplishments.
  - e. If applicable, discuss cause and solutions to performance issues/problems. The Supervisor should ask how he/she can help the staff member succeed.
  - f. Update goals as need to be current and achievable by the completion of the next review period.
5. Follow Up Items
  - a. Follow through on agreements and commitments.
  - b. Schedule follow up discussions as appropriate.
  - c. Continue to provide feedback and support.
  - d. Monitor and share feedback on progress towards goal achievement.