



Supervisory Guidelines for Mid-Year Performance Discussions

The University's annual performance period for the Employment Performance Management System (EPMS) is August 1 – July 31. Therefore, mid-year discussions should occur at the midpoint, during the January-February timeframe. Mid-year discussions with probationary employees should occur six months from the hire date.

Supervisor Goals	Employee Goals
<ul style="list-style-type: none"> ✓ Provide feedback to employees on performance to date ✓ Indicate performance positives and deficiencies ✓ Identify updates needed for the EPMS Planning Stage document 	<ul style="list-style-type: none"> ✓ Discuss accomplishments to date with supervisor ✓ Communicate to supervisor any challenges that may be hindering performance expectations being met

Schedule mid-year meeting with employee.

- Plan a date and time that will allow for adequate discussion.
- Explain the purpose of the mid-year discussion is to review job responsibilities and performance goals, and discuss progress to date.
- Ask employee to come prepared to discuss progress on goals, accomplishments to date, obstacles encountered, and remaining priorities for the year.

Prepare in advance for the mid-year discussion/review.

- Review the current Employee Performance Management System (EPMS) Planning Stage.
- Gather supervisory notes and any other performance-related information.
- Determine whether there is a clear need for additional training, professional development opportunities, and/or a performance improvement plan.
- Create an agenda to keep you both focused during the meeting.

Meet to share specific feedback.

- Focus on some key pillars: what has gone well, what could be improved and how you as a supervisor can provide better support.
- Give specific examples and feedback regarding strengths, opportunities, and results.
- Encourage feedback from employee. Engage in a two-way, meaningful discussion by asking employee's input. There should be no surprises and employees should be clear on where they stand.
- Review goals set in the EPMS Planning Stage to determine if any need to be revised or removed, adjusting weights as needed. Document any changes to the EPMS Planning Stage with initials and dates by both the supervisor and employee as appropriate.

Set expectations about what needs to be accomplished by the end of the performance period.

- Agree on what priorities remain for the rest of the performance period.
- Ensure a shared understanding of both short-term and long-term goals to eliminate surprises at the Evaluation Stage.
- Be clear on how you can help manage any challenges and obstacles the employee may be facing. Be accountable to any commitments for assistance you offer.

Complete the discussion.

- Express appreciation by thanking the employee for their work.
- Summarize and document the discussion, and share summary with the employee via email.
- Schedule follow-up discussions as needed.

Mid-year Discussions/Reviews are not required; however, periodic performance feedback and coaching should be ongoing throughout the year, and as early and often as possible with probationary employees. Mid-year Discussions are not formal performance evaluations and should not be submitted to Human Resources for personnel files.