



**Supervisor/Manager
Preparation Guidelines
for the
Performance Management Review**

As a manager, you are responsible for setting goals for your department and for ensuring that employees on your team understand what is expected of them. The annual review is the time to formally document and discuss their progress. As you prepare for the discussion, please familiarize yourself with the *Performance Management Review Form*. There are three sections: the **Overview**, **Instructions to Supervisors**, and **Ratings to be Used in the Review**. Please read these sections carefully before you proceed.

March 1, 2007–April 1, 2008

- Familiarize yourself with the Performance Management Review form and rating system. Make sure that you have the documentation to support your ratings in the **Comment** section. A rating of Proficient means that an individual's performance is highly competent and consistent, which typifies the performance level of the majority of Smith staff.
- Review the job descriptions of your direct reports so you understand the duties and responsibilities required of their positions. Be prepared to discuss institutional and departmental priorities and how job duties and responsibilities may need to change to align with these priorities.
- Invite direct reports to participate in the performance review preparation process. Ask them to provide information for their written reviews, and suggest they be prepared to discuss their accomplishments, challenges, successes, and concerns.
- Be prepared to discuss future goals and training needs so you and your direct reports agree and share the same expectations. Also be prepared to discuss skills and competencies you would like them to develop.

DURING THE YEAR

- Communicate often with your direct reports so that next year's annual performance reviews are a summary of previous conversations. If things are going well, let the person know. If something is not going well, give the person clear feedback so they can begin a correction.
- Keep a written record in a log or report. Having a written record of what employees have accomplished, what projects they have worked on, and what they have done with time and other resources provides substance for their written reviews and performance conversations. Quantify this information, whenever possible.