Performance Planning Conversation Model for Managers

Planning

- Schedule time on the calendar to have the discussion
- Prepare to share university and school/unit strategic goals and develop SMART individual employee goals
- Share university core and leadership competencies

Discussion

*Establish the Agenda*
- State the purpose and format for the meeting

*Explain the Cascading/SMART Goals Concept*
- Briefly identify the VCU strategic priorities
- Make the connection between the university goals and the school/unit mission/vision/goals

*Share Your Ideas*
- Share specific employee goals critical to success in the position
- Communicate to create professional development goals
- Ask for the employee’s reaction
- Surface obstacles and issues
- Offer information and assistance
- Summarize key goals and action steps mutually agreed to
- Make the connection between the university goals and the school/unit mission/vision/goals
- Highlight core and leadership competencies that will be applicable to achieving the goals

*Agree on Action Plans*
- Check for employee’s commitment to the action plan
- Express confidence and offer support
- Ask employee to summarize understanding (if necessary)

Follow-up

- Observe
- Measure
- Coach (discuss strengths and opportunities for growth/improvement)

Performance Planning Conversation Model for Managers
Suggested Conversation Guide
Explaining the Cascading SMART Goal Concept

- Developing sound university, school/unit and individual goals, is critical to employee and university success.
- Each year we will work together to set and clarify goals for the upcoming year/performance review period.
- Having clear alignment of goals allows everyone to work in support of a larger goal, and helps everyone see how their day-to-day activities contribute to the success of the university and establishes a framework for individual career growth and success.
- Goals should be SMART – specific, measurable, achievable, results focused and time-bound.

Ways of Asking for Input

- As you consider the goals for your work over the next year, what is missing from your perspective?
- What questions do you have regarding the specific goals I’ve shared and how what you do contributes to the overall success of the university?

Ways of Building an Action Plan

- What is one thing that you think it would be beneficial for you to work on to help you achieve your goals?
- How can I be helpful?
- What is one thing that you can begin to do as an action step tomorrow to be more effective?
- Would you be open to listing to some ideas I have for moving forward?
- Of the suggestions I shared, which ideas sound best to you.

Ways of Summarizing

- What I heard you say was…was my interpretation on track?
- How do the ideas we just discussed sound to you? Does this sound like something you may be able to use? Why, why not?
- How may I be of assistance to you?
- What questions can I answer for you?

Ways of Checking for Commitment

- How would you characterize your level of commitment to the plans we developed?
- It is important that we conclude our conversation by making certain that we have a mutual understanding of the next steps, recap the highlights of our discussion today in your own words.