



## Performance Management Mid-Year Review

### Manager Process Overview

#### Managers – make the most of Mid-Year Review with your direct reports!

From **December 1 – January 31**, our Performance Management system opens for Mid-Year Review. Time flies, and Mid-Year Review provides us with an opportunity to reflect on the past few months. Work with your direct reports throughout the year by providing ongoing feedback so that you can use this time to realign on goals for the current fiscal year.

#### Preparing for the process

1. Proactively review the goals and Progress Notes your team has entered in the system. Note any changes to your function's strategic priorities and identify their impact on your team's written goals.
2. Schedule time with each of your direct reports at least 2-3 weeks in advance to ensure all are prepared for their Mid-Year Review.

#### Conducting the conversation

- Arrive to the conversation with an open mind. Remember, this is a member of your team – their success is yours as well, and it is important to work together on best defining your annual goals.
- Ask your direct report open-ended questions to generate a more productive dialogue:
  - What accomplishments are you proud of over the last six months?
  - What was a miss, and how did you learn from it?
  - How can I – as your manager – better support you?
- Your direct reports are counting on you for honest coaching and feedback. In conducting a Mid-Year Review, remember that this is not the time for ratings but rather, realignment.
- Thank your direct report and restate the agreed-upon changes to their goals (if any). Be sure to take notes during the session so that you can update the **Progress Notes** in the system accordingly.

#### Finalization

1. After conducting the Mid-Year Review conversation, your direct report will make the necessary updates in the Performance Management Tool. Use this time to update the **Progress Notes** section.
2. The updated goals will arrive in your queue after your direct report selects **Submit for Approval**.
3. Based on their inputs and the alignment with your conversation, **Approve** or **Reject** the goals.

Want to learn more about the system? [Click here for the Mid-Year Review System Guide for Managers.](#)

For more resources and tutorials, visit [the OneRED website.](#)