

Annual Progress Review

Part 1 – Questions for discussion: The first part of the annual progress review is to check in with the person and get an overview on how they are doing and where they want to go.

Questions:

1. What is your why?
2. What goals do you have for the next academic/fiscal year?
3. In what areas would you like to grow this next year?
4. What is the long-term vision you have for yourself or your department and what steps can we take this next year to move closer to this?
5. How do you feel about your engagement and the team?
6. How would you evaluate your well-being?

Part 2 – Overall Summary

Complete this section last, but before you meet with the individual. Take into consideration the individual achievements the person had, how they work with other team members in their team and with their internal partners, and how their work has impacted their customers which may be students or other employees.

This is usually 3-4 paragraphs of information. In this format, you can cover some of the highlights in the initial paragraph along with the highlights, cover areas for improvement in the middle, and finish with additional positive material for the individual.

Part 3 – Review of Data

Every position should have some type of key performance indicator you can measure to see if the person is effective. This can include team information on student satisfaction and department performance. In addition, consider the team lag and lead indicators for the team and how this individual plays a role. If you are gathering feedback from a

360 degree survey or a department engagement survey, this is the place for that information.

Tips:

- I provide the completed document before we meet. Annual reviews can be stressful and if individuals have the chance to review and think about the document before, it can make the conversation less stressful and more productive.
- I've started going to a neutral location for these meetings. Sometimes an office can restrict conversation and finding a place to get coffee together or treat your employee to lunch can make it a more productive experience.
- Write down the key things you want to cover. You will probably have items you will mention, but assume if it isn't written down, it won't be retained. In looking at areas to improve, it is important to have this a part of the written information to refer back.
- Follow your college's performance evaluation process. I've used this in addition to the official college performance evaluation. I've experienced the official evaluation usually is more of a report card. By including this as a part of the evaluation, it can open up more conversation than a typical official performance evaluation.