**Performance Cycle**

**Focus Today – Annual Review**

- **Plan**
  - Document agreed upon plan of work

- **Monitor**
  - Meet regularly to review progress & coach
  - Locate resources & best practices to support faculty

- **Assess**
  - Annual Review

- **Reward & Recognize**
  - Annual Merit Process
  - Consider special recognition opportunities

---

**Preparing/Delivering Annual Review Best Practices**

- The annual review should not contain “new” information.
  - Ideally you have been meeting with the individual over the annual review period and providing feedback.
  - Individuals should be aware of how their performance will be assessed before the review.
- Schedule adequate time for the meeting.
- Do not allow interruptions.
- The annual review meeting should be a two way process.
  - The faculty member should fully participate in the dialog.
Preparing/Delivering Annual Review
Best Practices

• Be sure the final assessment is supported by the narrative:
  • Provide specific examples of why performance is outstanding, exceeds, meets, doesn’t meet expectations
  • Use objective data to support assessment – focus on results/behaviors
• Speak to performance in terms of the definitions from policy, not as a “number”

Preparing/Delivering Annual Review
Preparing for a Difficult Conversation

• Position the message so that it will be heard
  ◦ Avoid using words like “always” and “never”
  ◦ Listen to faculty member’s input – seek clarification
  ◦ Provide encouragement and guidance
  ◦ Review options for development
  ◦ Utilize support from HRSM
  ◦ Discontinue and reschedule meeting if university values are at risk
Preparing/Delivering Annual Review

What Not To Do

- Things that are against the law:
  - FMLA covered absences may not impact review
  - Individual’s protected group, class or category may not impact review
  - Retaliation

- Do not let past reviews bias the current review.
- Do not let a single event unduly influence overall assessment (positive or negative)

Preparing/Delivering Annual Review

Reminders

- Think of yourself as a coach not a judge
- Feedback improves performance

*Dr. Christopher Lee, April 2014 visit to RIT (sponsored by ADVANCERIT)