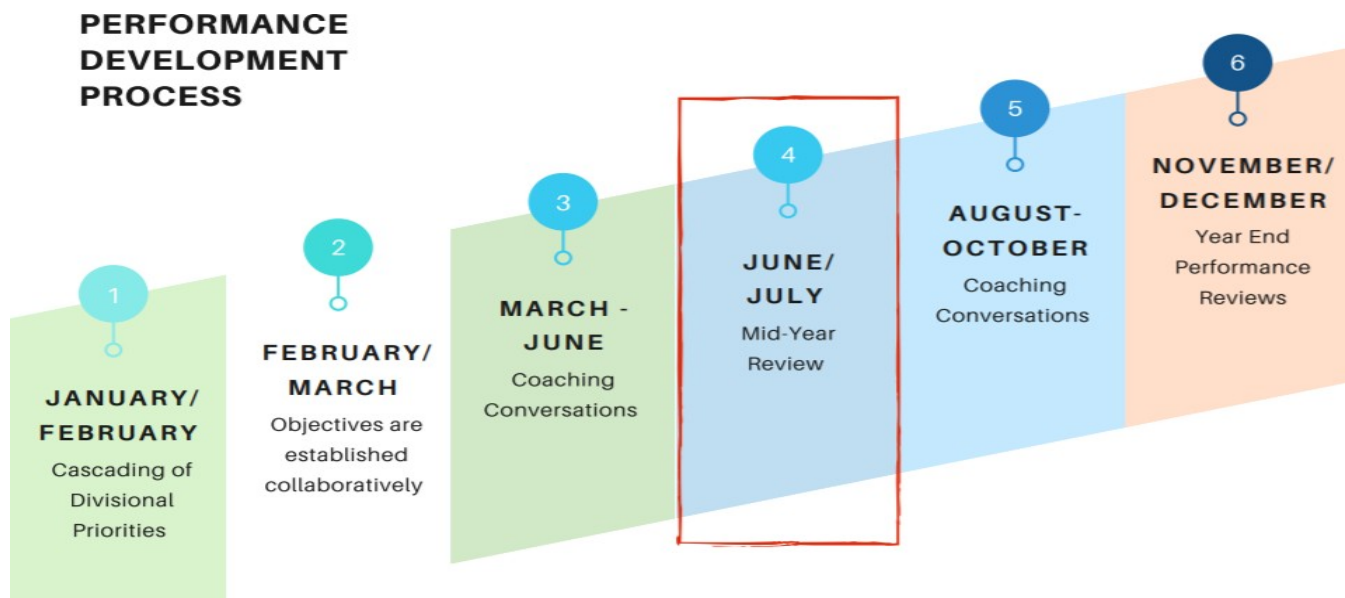


## Performance Development Program

### Mid-Year Review

Conducting a mid-year performance review allows supervisors the opportunity to evaluate their employees' progress towards their objectives, provide feedback and discover potential barriers to success.

The mid-year review conversation is an opportunity for an employee to check in and see how they are performing. Mid-year reviews are meant to be two-way conversations focused on employee performance and competency demonstration. It is important for supervisors to take this time to focus on what employees are doing well, as well as where there are opportunities for growth and/or improvement. Remember, there should not be any surprises during the mid-year conversations, as you should have had ongoing coaching conversations with your employees throughout the mid-year performance period.



### Components of Reviewing Performance

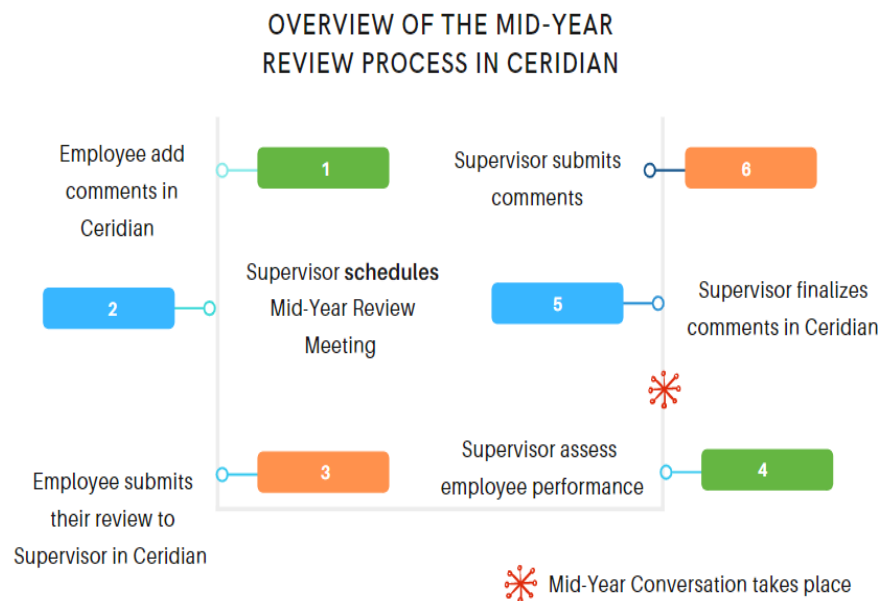
There are two components for reviewing performance and both are equally important: **objectives** and **competency** demonstration.



## Overview of the Mid-Year Review Process

### Process steps:

- Supervisor schedules mid-year review meetings with employees.
- Employee adds comments to their mid-year performance review in Ceridian Dayforce Performance Module related to their objectives progress as well as their competency demonstration in advance of their scheduled mid-year review meeting.
- Employee submits their mid-year review to you in Ceridian Dayforce Performance Module.
- Supervisor assess employee's performance, reviews coaching conversation notes from the previous few months, reviews the employee's comments in Ceridian and prepares to hold the performance review meeting.
- Performance review meeting held.
- Supervisor calibrates assessment based on review discussion and finalizes comments in Ceridian Dayforce. The information should be reflective of the performance discussion.
- Supervisor submits comments.



## Getting Ready for Mid-Year Performance Discussions

### Supervisor Guidelines

#### Schedule the mid-year performance meeting:

- Provide your employee with advance notice of the mid-year performance review meeting.
- Ensure you allow enough uninterrupted time for you and your employee to meet and share insights (one hour is recommended).
- Ensure that the meeting is scheduled in a confidential space. If the meeting will be virtual, suggest that you and your employee meet by video conference so the discussion can be more personal.
- Ensure your employee has added their mid-year update comments to both their objectives and competencies in Ceridian Dayforce so you can review them prior to your mid-year review discussion.
- Share an agenda of the meeting ahead of time so that your employee knows what to expect during the discussion.
- Ask your employee to come prepared to discuss the major accomplishments achieved to this point. Also ask them to come with examples of how they have demonstrated the required competencies on a regular basis.

## Prepare for the mid-year discussion:

- Prior to the meeting, do your prep work. Review your employees' objectives and competencies and prepare notes on your assessment of how the employee has performed to date.
- Review your notes on what your employee has accomplished to date and where there were roadblocks etc.
- If your employee has been working on projects, in a team, with a specific customer, solicit feedback from the supervisor of the project, team or customer. This will help to ensure the review is balanced and captures all the work the employee has been performing.
- Remember that you need to provide honest balanced feedback. If you expect the conversation may be difficult, it is always recommended to practice what you want to share in advance, so you are more comfortable in the actual meeting setting.
- Ensure the meeting space provides for a confidential uninterrupted conversation; remember to put your phone on silent.
- Provide an overview of the agenda for the meeting.
- Solicit feedback from your employee first, ask them to share how they think they have performed, where they experienced roadblocks or challenges etc.
- Remember this is a two-way conversation, you need to listen as much if not more than you are speaking.
- Share with the employee what objectives you think they have done effectively to date, make sure to ground these with examples.
- Discuss areas where you as the supervisor see growth or improvement opportunities, ground this information with examples. Remember, it does an employee a disservice to not address performance issues, as they are left with the impression that they are performing as expected.
- Ask your employee how they think they could improve or grow in the areas your identified require further work.
- Establish clear expectations and a clear plan on how these improvements will be achieved (these should be reflected in your comments added to Ceridian Dayforce).

## Conversation starters:

Performance conversations can be difficult; knowing what to say and how to say it can be a challenge. Below are suggested 'conversation starters' to assist you in facilitating and engaging during performance discussions:

- *How do you feel your performance has progressed so far?*
- *Could you walk me through your accomplishments?*
- *Can you share your perspective on 'X'?*
- *How do you think this situation impacts me/your team/ the organization?*
- *How are you feeling about how well you have consistently demonstrated 'X' competencies?*
- *Share with me some context or examples relating to your objectives and competency demonstration?*
- *What areas do you think you excelled in? Why?*
- *Are there areas where you need more growth or have room for improvement? What are they are why?*
- *I have seen you demonstrate 'X' effectively and consistently, where did you learn it/how did you get there?*
- *What support do you need from me?*
- *Sometimes I have observed 'X' is not consistently demonstrated, what's preventing from consistently demonstrating XX? What can we do to change this?*
- *What do you need to do, and when, to address this issue?*
- *What have you already tried to solve this problem? What worked? What didn't work?*
- *On your last project/assignment, what do you think you could have done better? Why?*
- *What do you see as the next action areas?*
- *What support do you need from me?*

## Meet and discuss performance:

- Ensure the meeting space provides for a confidential uninterrupted conversation; remember to put your phone on silent.
- Provide an overview of the agenda for the meeting.
- Solicit feedback from your employee first, ask them to share how they think they have performed, where they experience roadblocks etc.

- Remember this is a two-way conversation, we need to listen as much if not more than we are speaking.
- Share with the employee what objectives you think they have done effectively to date, make sure to ground these in examples.
- Provide specific, behavioural examples of what the employee is doing particularly well related to competency demonstration.

#### Calibration of objectives:

- Based on your discussion, if required, you and your employee should recalibrate objectives for the last 6 months of the year.
- If there are any changes required to objectives, agree on how they should be prioritized for the remainder of the performance year.
- Ensure there is a shared understanding of performance expectations to minimize surprises at the year-end performance review.

#### Complete the performance discussion:

- Provide your employee with an opportunity to discuss anything else related to the discussion or their position.
- Document the discussion and align on any action items.
- **Update your mid-year review comments in Ceridian Dayforce; your comments should be reflective of the mid-review conversation that took place with your employee. Remember, there should be no surprises!**
- Schedule future coaching meetings. Performance development is a continuous process, with coaching discussions taking place at least monthly.

## Tips for Navigating Difficult Mid-Year Conversations

Performance conversations can be difficult and as supervisor you need to be prepared for any direction the conversation may go. Having a defined framework or set of steps that you can follow will help you to handle the difficult conversations more effectively.

#### Use the EASE Framework to help you navigate difficult conversations:



#### Prepare:

- **Determine the purpose**
  - Identify the specific behaviour that will be discussed and support it with examples, incidents, results, and metrics. Collect any relevant documentation as well as related policies (if applicable).
- **Establish the intent and desired outcomes**
  - What is the desired behaviour change that you want to get from the conversation?
  - What is the desired impact that you want to see in the work environment as a result?
- **Set the goal that you want to achieve during the discussion**
  - What do you need to learn during the conversation?

- Pre-plan what action you would like to drive at the conclusion of the meeting.
- Set goals that are attainable and realistic.
- **Set the message that you want to share**
  - Determine safe language and communication you will use in the meeting.
  - Practice key discussion points. Use a mirror or a smartphone to help you determine appropriate non-verbal communication. You can also try out the conversation on another supervisor to help determine the appropriateness of your language choice and if you are sending a clear message.

### Engage:

- **Deliver your message in a calm and professional manner:**

If it is a particularly emotional situation, be aware of your own emotions and how they may impact what you say or how you act. If necessary, take a five-minute break to cool off.
- **Keep messages short and to the point:**

The explanation should be concise. People are more likely to listen and catch all the points that you want to address when your message is short. Conciseness also prevents confusion.
- **Focus on the behaviour and not the assumed intent:**

Sometimes people are not aware of the effects that their behaviour has on others. Your explanation should be as objective as possible, focusing on the facts and not feelings.

### Absorb:

- **Actively listen**

Listen actively to the message that the employee is sharing. Listen for commonalities in their story regarding the issues, values, and feelings, and use those towards achieving your goal and navigating towards an end result. Demonstrate active listening by taking notes, paraphrasing the message, making eye contact, and asking questions.

### Share:

- Share the impact of the behaviour with the employee. They may not be aware of how their actions affect the team and their work.
- Adjust your response based on the employee's emotional state.
- Use "I" statements when talking about feelings, concerns, or expectations as they pertain to you. This helps you keep from stating your judgments as facts. For example, I am concerned, I am worried, I think, etc.

### End:

- This step will require actionable next steps, goal setting, and plans for follow-up. Setting the follow-up meeting now will encourage the desired behaviour change. It also demonstrates your commitment to resolving the issue.
  - Work with the employee to develop a solution.
  - Develop alternatives if the preferred solution is not attainable.
  - Focus on realistic goals and solutions.
  - Continue to ask questions and probe to help come to an end result.
  - Document a summary of the discussion and agreed upon actions for reference.
  - Book the follow-up meeting once the conversation is done.