

EMPLOYEE NAME SAMPLE DATE SAMPLEJOB TITLE & SALARY GRADE SAMPLESUPERVISOR NAME & TITLE SAMPLE DEPARTMENT SAMPLE

## 1. GETTING STARTED

Successful conversations begin with preparation, **either the employee or the supervisor can start this process**. Before beginning the performance and development cycle review the performance & development program toolkit for supervisors and employees:

- [Performance and Development FAQ's and Information](#)
- [Performance Development Cycle – Getting started](#)
- [Effective Feedback](#)
- [Difficult and Productive conversations](#)
- [Coaching Questions](#)
- [Setting Key Goals](#)
- [8 Pitfalls to Avoid for Supervisors](#)

## 2. IN YOUR FIRST MEETING

- Review **how the job contributes to the bigger picture** - the department, the University strategic plans and service to students.
- Review the [UVic competency model](#) for areas of focus and development.
- Discuss the **alignment of the job duties** with the division or department goals/objectives/values and the University's [Strategic Framework](#).
- Review the **job description for the purpose of ensuring it is aligned with the position's key responsibilities**. If the job duties have changed substantially, discuss with a supervisor or Human Resources.
- Explore communication styles between employee and supervisor. **How do you each prefer to [give and receive feedback](#)**? What is the best way to provide recognition or clarify expectations? These discussions are much easier to have in Step One and will help to give and to receive feedback later on.

### 3. SET KEY GOALS

**Discuss how the goals should be written.** Either the supervisor or the employee can do the first draft, as long as both agree on the goals.

#### 1. GOAL –

Increase customer satisfaction survey results by 15% over the next year. Take a customer service course and apply concepts to improve my interactions with clients, and share my learning with the team.

#### TIMELINE AND SUPPORT

- By spring - take Customer Service course through employee learning calendar.
- In the summer, supplement learning by taking a Lynda.com online course on Dealing with Difficult Customers.
- Manager support to approve time away from the office to take course.
- Manager support to provide guidance on how to use concepts learned in training and apply to our work environment.

#### 2. GOAL

Create a user manual that documents steps, processes and procedures for our frontline services with the goal of decreasing learning curve for staff assigned to this role and increasing consistency of how tasks are completed in these roles.

#### TIMELINE AND SUPPORT

- Contact similar UVic departments to see if they have manuals to share
- Spend one month recording and tracking procedures unique to our department
- Review previous year's calendar to identify seasonal/annual activities
- Develop a template for the manual and review with other team members at our June team meeting
- Populate manual sections over the summer/fall as time permits including links to resources, policies and relevant contacts
- Test manual with new staff in October and have changes completed by December.

#### 3. GOAL

Improve my skills when chairing meetings. Goal is to apply best practices in facilitating effective meetings so that agenda items are addressed within allotted time, start and finish on time, and ensure all participants have an opportunity to contribute.

#### TIMELINE AND SUPPORT

- In the next 3 months, complete a Lynda.com course on effective meeting management
- In the next 5 months, observe how meetings are chaired by others and note helpful practices
- Over the next year, implement new meetings practices in team meetings
- Ask team for feedback and adjust practices as needed
- Manager support required to take courses

#### 4. GOAL

Increase my network and engagement with UVic community activities by participating on a steering/advisory committee. As a representative of our unit on the committee I would also like to help others better understand our unit and what we do.

#### TIMELINE AND SUPPORT

- By December, identify a suitable steering/advisory committee – discuss with you for approval.
- Learn about the mandate and terms of reference of the committee and discuss our department's participation and priorities.
- Provide updates to you and the team about my contributions and learnings on the committee at our team meetings.

Cut/Paste to add room for more goals, or if you use a different goal setting template you may simply attach your own goals document to the Step One form

#### 4. IDENTIFY A LEARNING PLAN

**Develop a learning plan.** Include what and how learning will occur and what support will be provided. For example: attending workshops, conferences, [employee learning calendar](#), cross training or stretch assignments.

Attend Customer Service and Meeting Management courses.  
Take 2 additional courses towards my certification program

#### 5. PLAN REGULAR STEP 2 CHECK-IN MEETINGS

**Determine the frequency of your STEP 2 check-in conversations** and schedule these into your calendars. Use the [STEP 2 forms](#) to capture notes from your check-in conversations.