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Performance Dialogue

FMHS - January 2024

Performance Dialogue



Introducing a New and Improved Performance Dialogue Process and Form

FMHS - January 2024

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4. Introduction to the 360 Degree Feedback
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6. Yearly Strategy for Linked Activities
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8. Questions



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Introduction

Performance Dialogue (PD) is an important process for all MPEX employees in the University.

In today's workforce, employees mention among priorities for an employer to have clear career paths and recognition for their work.



Having a PD that is constructive, a tool for the employee's development and recognizing their contributions is thus, paramount.



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Benefits of New Process



The new Performance Dialogue Process offers a consistent and structured approach to performance evaluation throughout the FMHS

It promotes accountability and fosters a culture of continuous improvement, resulting in enhanced employee engagement and productivity.

It provides a simplified approach, based on comments and recommendations gathered in a Focus Group with FMHS Managers.



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Best Practices for Performance Dialogue

Encouraging open and honest communication during performance dialogues is crucial.

Active listening, constructive feedback, and recognition of achievements of employee as part of the team.



Positive and productive two-way dialogue environment.



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Best Practices (cont'd)

- ❖ Review the employee's performance throughout the designated period (have they reached their objectives?)
- ❖ Ask the employee to come prepared with their part of the form completed.
- ❖ Note specific achievements, areas of improvement, and have examples ready to support feedback (employee should too).
- ❖ Use examples from the 360 Degree Feedback, if used.
- ❖ Collaboratively develop an action plan for improvement, if necessary.
- ❖ Set specific, measurable, achievable, relevant, and time-bound (SMART) goals together. Not more than 3 or 4.
- ❖ Provide ongoing support and guidance to help the employee succeed.
- ❖ Follow up at around the 6-month mark for mid-review. How is the employee doing with their objectives? Is there support needed to be on-track?



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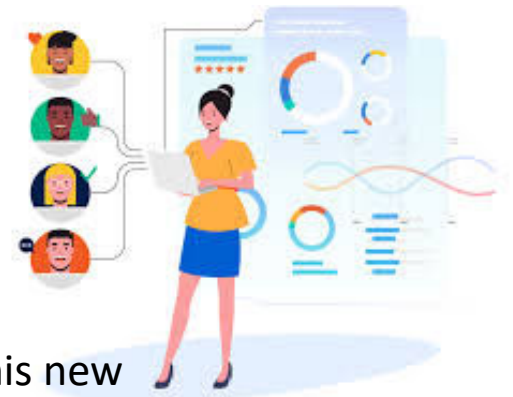
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Introduction to the 360 Degree Feedback

Utilizing 360 degree feedback as a pivotal tool for leadership development, cultivates enhanced managerial prowess and is an endorsement of an organizational culture that champions the ceaseless pursuit of knowledge and advancement. More specifically, it:

- Offers Managers Multiple Perspectives
- Enhances Leadership Skills and Behaviours
- Customizes Leadership Development
- Improves communications and collaboration



We encourage you to use the proposed 360 Feedback form included in this new process to have a more holistic approach to Performance Dialogue. You may send the form to collaborators such as:

- Teammates / Peers
- Collaborators / Internal customers
- Direct Reports (if applicable)



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Key Features of the New Form

- ❖ The updated Performance Dialogue Form is now in an editable Excel Form with tabs to complete for each section.
- ❖ Color-coded, it is easier to use for both the employee and their manager.
- ❖ The Talent Management Team will be able to analyze needs for development, emerging trends and tailor their approach and initiatives.
- ❖ We also introduce 360 Degree Feedback Form.



Note: the Forms are available in both French and English



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Performance Dialogue - Guide

Performance Dialogue Form
For Executive, Management Staff and
Employees in positions excluded from MUNACA bargaining unit

Instructions
Step 1: Manager completes the Unit objectives in the 2024 Objectives Tab then send the form to the employee to fill out
Step 2: Employee completes the form (sections identified in yellow) and send back the form to their manager
Step 3: Manager reviews the employee's comments and adds its own comments. (sections identified in Blue)
Step 4: Performance Dialogue Meeting between you and your manager
Step 5: Manager submits the completed performance dialogue form to the HR department at : per-dialogue.med@mcgill.ca

IMPORTANT: To skip a line in a text box, click **Alt + Enter**

PERSONAL INFORMATION

Employee Name:

Position:

Department / Unit:

Immediate Supervisor's Name:

Role Profile (ex. PER1A, SAF2B, etc.):
Information is available in Workday

Date:
yyyy-mm-dd

Personal Information | 2023 Objectives | Behavioural Competencies | 2024 Objectives | 20

You will find instructions at the top of each tab that explains how to complete the form

Enter the employee's information here. The role profile can be found in Workday

Each tab of the Excel document represents a section of the Performance Dialogue form



Performance Dialogue - Guide

SECTION 2 - 2023 OBJECTIVES SUMMARY

INSTRUCTIONS
Please use the 2023 Performance dialogue form for reference to complete this section.
New employees who started in 2023 and/or don't have objectives identified for 2023 can skip this section.
IMPORTANT: To skip a line in a text box, click Alt + Enter

2023 - Employee objective 1 (Add the objective identified in 2023)

Employee's comment at year end (Enter comments at the reference period year-end)

Manager's comment at year end (Enter comments at the reference period year-end)

2023 - Employee objective 2 (Add the objectives identified in 2023)

Employee's comment at year end (Enter comments at the reference period year-end)

Manager's comment at year end (Enter comments at the reference period year-end)

Personal Information | **2023 Objectives** | Behavioural Compete

Employee objectives: Please use the 2023 Performance Dialogue form for reference to complete this section

*Employee's comment (**Yellow section**) & Manager's comment (**Blue section**) : Enter comments for each of the Work Objectives in the dedicated boxes.*



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SECTION 3 – BEHAVIOURAL COMPETENCIES

INSTRUCTIONS:

In completing this exercise, please consult our Behavioural Competencies Toolkit for examples of competencies and position targeted levels per job family on the HR website under <https://www.mcgill.ca/od/performance-management/behaviour-competencies>

- The employee selects at least 2 competencies that they best masters and adds their comments under the selected behavioral competency with examples of their greatest achievements. The manager then adds their comments and inserts the comments received during the 360° evaluation, if available.

- If applicable, the employee and their manager could also explore and agree upon 1 to 2 competencies that would be most valuable to enhance the employee's performance, job satisfaction, and career aspirations.

Change Agility Embraces change and improvement to move the University ahead	Employee's comments
	Manager's comments
Resourcefulness Gets things done efficiently and resource-effectively	Employee's comments
	Manager's comments
Teaming Contributes to or builds effective	Employee's comments
	Manager's comments

Personal Information | 2023 Objectives | **Behavioural Competencies** | 2024 Objectives

The employee selects at least 2 competencies that they best masters and adds their comments under the selected behavioral competency with examples of their greatest achievements. The manager then adds their comments and inserts the comments received during the 360° evaluation, if available.

If applicable, the employee and their manager could also explore and agree upon 1 to 2 competencies that would be most valuable to enhance the employee's performance, job satisfaction, and career aspirations.



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SECTION 4: 2024 OBJECTIVES

INSTRUCTIONS:

Please note -- Objectives can be:

- Reviewed and adjusted during the reference period following an agreement between the staff member and the immediate supervisor
- Linked to My Healthy Workplace initiatives like Wellness, Sustainability, and Continuous Improvement

IMPORTANT: Click Alt + Enter to skip a line in a text box

2024 Unit Objectives

Unit objectives and priorities should be cascaded down to the individual staff member. For examples, please visit the HR Website under: <https://www.mcgill.ca/od/performance-management/performance-dialogue>

2024 Individual Work Objectives

Objectives should be SMART (Specific, Measurable, Achievable, Realistic, Timed). For examples, please visit the HR Website under: <https://www.mcgill.ca/od/performance-management/performance-dialogue>

Employee's Individual Work Objectives should be aligned with the Unit's Objectives. Individual Work Objectives can also be modified once discussed at the mid-point check-in to reflect changes in Unit priorities.

Objective 1

Objective 2

Objective 3

We recommend that Unit Objectives be discussed at the beginning of the reference period in order to ensure that the employee's Individual Work Objectives are well aligned with the University's Mission

Employee's Individual Work Objectives should be aligned with the Unit's Objectives.

Personal Information

2023 Objectives

Behavioural Competencies

2024 Obj



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SECTION 3: TRAINING & DEVELOPMENT

INSTRUCTIONS

Supervisors and Employees must identify and agree on professional development initiatives that would be most valuable to enhance the employee's performance, empowerment, and career aspirations.

IMPORTANT: To skip a line in a text box, click Alt + Enter


Technical and Professional Competencies

	Competency	Level	Method(s) by which the skills will be developed (Mentoring, OD Training, LinkedIn Learning, etc.)	Explain how this training will relate to your Objectives or job description
1				
2				
3				
4				

Supervisors and Employees must identify and agree on professional development initiatives that would be most valuable to enhance the employee's performance, empowerment, and career aspirations.



360° Evaluation

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360° Feedback for peers, collaborators and direct reports (if applicable)

Please take a few minutes to answer this ANONYMOUS survey as a peer, collaborator or direct report.
To skip a line in a text cell, press Alt + Enter

1) How long have you been collaborating with this individual?

2) Overall, how satisfied are you with your collaboration with this individual?

3) How effectively does the individual communicate and collaborate with you?

Please answer question 4 & 5 only if the individual is your manager

4) How effectively does the individual provide clear expectations, guidance, and support in their role as a supervisor or manager?

5) Please provide specific example(s) to the above, if the individual is your manager.

6) How well does the individual understand and meet your unit's needs and expectations?

7) How well does the individual respond to your feedback, concerns and requests?

8) What are the key strengths and areas of improvement of this individual, according to your observations and experiences with them?

360° Feedback_English Rétroaction 360°_Français

The 360 Feedback form is anonymous.
We recommend the use of the 360 Feedback form in your performance dialogue exercise. It will allow you to get feedback not only on the employee's performance but also on their attitude, behavior, and interactions with other team members such as peers, collaborators and direct report when applicable.

The form is available in English and French



Performance Dialogue vs. Career Conversation vs. Stay Interview...

Performance Dialogue: Involves feedback on current job performance, goal setting for the next performance period, and addressing any immediate performance-related concerns.

Career Conversation: Includes discussions about the employee's long-term career goals, skills and competencies needed for future roles, and strategies to achieve those goals.

Stay Interview: A retention tool to uncover what would make a great employee leave the organization and focuses on what motivates them to stick around, what could be better about their employee experience.



Note: We encourage you to visit this [link](#) for additional info the Career Conversation and Career Development Plan and for the Stay Interviews Presentation



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Yearly Strategy for Managers To Follow



Performance Dialogue
(including the 360 Feedback)
January – February



Annual Compensation
Review
March – April



Annual Compensation
Review Statement
June



Career Conversation
March – May or
September – December



Performance Dialogue
Mid-review
June – September



Stay Interviews should be performed to employees between 6 to 24 months of service or any employee of high value/profile in high demand



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Thanks!

Please visit the following links for more info
and to access the PD and 360 Feedback Forms

[Presentation and Forms](#)

[McGill University OD Website](#)

The Talent Management Team talentmanagement.med@mcgill.ca

Many thanks and much gratitude to Jessica and Angela in Organizational Development
and to our Focus Group of Managers!

From a working place to a growing place



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