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Performance Dialogue

FMHS - January 2025

Performance Dialogue - Exercise 2025



FMHS – January 2025

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Agenda



- Introduction
- Best Practices for Performance Dialogue
- PD is a Tool for Merit Assessment
- Performance Categories Definitions
- MPEX temporary employees
- Objectives Linked to Strategic Plan
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- Key Features of the Performance Dialogue Form
- PD and 360° Evaluation forms - Guide
- Performance Dialogue vs. Career Conversation vs. Stay Interview
- Yearly Strategy for Linked Activities
- Questions



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Introduction

- ❖ Performance Dialogue (PD) is an important process for all MPEX employees in the University (**see also MPEX M temporary (M TERM employees) – slide 9*).
- ❖ 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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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?)* (*see also *PD is a Tool for Merit Assessment – slide 7*)
- ❖ 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) objectives* together. Not more than 3 or 4. (*see also *Objectives Linked to Strategic Plan – slide 10*)
- ❖ 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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PD is a Tool for Merit Assessment

While the PD is a separate exercise than the Merit Assessment, the PD is one of the useful tools to use to identify corresponding category for the yearly merit assessment (which usually starts mid-March and culminates with increases June 1st).

This year, Total Compensation (TC) will announce **a 5th performance category** for the assessment which you should have in mind when having the PD with your employee (**reminder: don't discuss the merit assessment nor give them the category at the PD stage**).

1- Significantly Exceeds Objectives

2- Exceeds Objectives

3- Consistently Meets Objectives

4- Partially Meets Objectives (NEW)

5- Requires Improvement

The next slide will summarize what you should have in mind for each category...



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Performance Categories Definitions

While TC will explicitly train all managers on these definitions and give examples when launching the Merit Assessment Exercise in March, here are some key definitions to all categories:

1- Significantly Exceeds Objectives

Employee consistently performs far above the required level in all key areas of responsibility. Their work is exceptional in terms of quality, quantity, and timeliness.

2- Exceeds Objectives

Employee regularly goes beyond the established standards and behaviours in their role. Performance is notably higher than the average level.

3- Consistently Meets Objectives

Employee reliably meets the established standards for their role. Performance is steady, dependable, and aligns with the goals set. Must have met all objectives set for the reference year. Performance is steady, dependable, and aligns with the goals set.

4- Partially Meets Objectives (NEW)

Employee meets some but not all of the established standards. There are areas where improvement is needed. Potentially a very recent hire who has yet to be able to fully contribute to the objectives.

5- Requires Improvement

Employee needs improvement to fulfill role requirements, essential duties and responsibilities. A discuss with HR advisor is required.



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MPEX M temporary (M TERM employees)

For harmonization and greater equity purposes, **starting with the 2025 Annual Compensation Review (ACR), temporary MPEX employees will be included in the annual compensation review process.** This change ensures that all MPEX employees, whether temporary or regular, **receive salary increases on the same date (June 1st, 2025).**

Temporary MPEX employees **hired before December 31st** will automatically be included in the 2025 ACR process.

Employees who are not/should not be renewed past June 1st, 2025: won't be. HR is currently working on these lists and will reach out as needed to managers to ensure smooth transition.

Starting now, we will renew M Term employees without adjusting their salary: they will be done June 1st of every year as all MPEX employees just like any new regular MPEX hire and/or unionized employees.



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Objectives Linked to Strategic Plan

Unit objectives should be in-line with any or all of the below priorities from the Strategic plan for the Faculty and be used for determining individual objectives for 2025.

1. Outstanding education for outstanding learners
2. Collaborative research and care for better health
3. Delivering with and for our communities
4. An efficient organization that does great work

<https://www.mcgill.ca/medhealthsci/about/strategic-plan/4-priorities>



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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 PD Form

- ❖ The Performance Dialogue Form is 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.
- ❖ Encouraging using a 360-Degree Feedback Form.



Note: the Forms are available in both French and English



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Human Resources

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 2025 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.):

The information is available on Workday

Date:

yyyy-mm-dd

< > **Personal Information** 2024 Objectives Behavioural Competencies 202

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



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Performance Dialogue - Guide

SECTION 2 - 2024 OBJECTIVES SUMMARY

INSTRUCTIONS

Please use the 2024 Performance dialogue form for reference to complete this section.
New employees who started in 2024 and/or don't have objectives identified for 2024 can skip this section.

IMPORTANT:

To skip a line in a text box, click Alt + Enter
You can manually adjust the height of the text box with your mouse

2024 - Employee objective 1 (Add the objective identified in 2024)

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)

2024 - Employee objective 2 (Add the objectives identified in 2024)

< > Personal Information **2024 Objectives** Behavioural Competen

Employee objectives: Please use the 2024 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.

IMPORTANT:

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

You can manually adjust the height of the text box with your mouse

Change Agility
Embraces change and improvement to move the University ahead

Employee's comments

Manager's comments

Employee's comments

Resourcefulne

< >

Personal Information

2024 Objectives

Behavioural 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.



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SECTION 4: 2025 OBJECTIVES

INSTRUCTIONS:

Please note that unit objectives and individual work 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:

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

You can manually adjust the height of the text box with your mouse

2025 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>

2025 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

Objective 4

< > Personal Information | 2024 Objectives | Behavioural Competencies | 2025 Objectives

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.



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SECTION 5: TRAINING, DEVELOPMENT & CAREER ASPIRATIONS

INSTRUCTIONS

- **Training:** 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.
- **Career aspirations:** Discuss the employee's desired role and career path. Employees also have the option to request a career conversation with their manager if they want to explore career development further.

IMPORTANT:

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

You can manually adjust the height of the text box with your mouse

Technical and Professional Competencies

	Competency	Level	Method(s) by which the skills will be developed (Mentoring, OJ Training, LinkedIn Learning, etc.)	Explain how this training will relate to your Objectives or job description
1				
2				
3				
4				
5				

Managers 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.

< > ... 2024 Objectives Behavioural Competencies 2025 Objectives 2025 Training & Career



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Career Aspirations

Discuss the employee's current role and aspired role.

Should you wish to explore career development in more depth, you can also have a 'Career Conversation' to facilitate deeper discussions and planning for your growth and aspirations. For more information about Career [career development presentation.pdf](#)

I would be interested in having a career conversation: Please select

Discuss the employee's desired role and career path. Employees also have the option to request a career conversation with their manager if they want to explore career development further.

< > Personal Information | 2024 Objectives | Behavioural Competencies | 2025 Objectives | 2025 Training & Career



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Performance Dialogue Year-End Appraisal

INSTRUCTIONS

Please add your signature by uploading an image of your handwritten signature. If you don't have one, you may type your name instead.

IMPORTANT:

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

You can manually adjust the height of the text box with your mouse

Employee's Signature:

Date:

yyyy-mm-dd

Manager's Signature:

Date:

yyyy-mm-dd

The manager and employee must sign the form by uploading an image of their signature. If they do not have a signature image, they may type their name instead.

> ... 2024 Objectives Behavioural Competencies 2025 Objectives 2025 Training & Career Signature



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360° Evaluation

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

You can manually adjust the height of the text box with your mouse.

Employee's name

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

Please select:

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

Please select:

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

Please select:

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?

Please select:

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?

Please select:

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

Please select:

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 form is available in English and French

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.



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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

From a working place to a growing place



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