**Guide: Introductory Period Review Coaching Feedback Input**

**The Process**

Complete the Coaching Feedback form in advance of **the second of your** **two meetings** with the employee.
(*You are responsible for scheduling both meetings. There is nothing you need to prepare for the first meeting.*)

The second meeting is your opportunity to formally provide feedback and share what you prepare on the form. During the meeting use the form as a reference to **share the information** ***orally***. Remember – **it’s not about the form** – it’s about the feedback and the opportunity this meeting provides to have a positive impact on job performance. It is important to not give the employee the form in advance of the second meeting or any time during the meeting. He/she should hear the information directly from you and not be reading ahead. The employee may ask clarifying questions or take notes. Give the employee a copy of the form at the end of the meeting.

**Feedback Elements**

**Strengths: Include at least 3 competency strengths**

Beginning with strengths opens the meeting on a positive note. Your credibility is built by recognizing both strengths and opportunities for improvement - not limiting your feedback to opportunities for improvement alone. Be strategic: the strengths you identify are those you wish the employee to continue doing! List the most important first. Use examples (events, incidents, accomplishments, etc.) so the employee clearly understands what you mean by the strength identified. A method for communicating strength competencies is given on the next page.

**Opportunities for Improvement: Include at least 3 competency opportunities**

Opportunities for Improvement fall into three categories:

1. Areas where improvement will enhance performance in the current role;
2. Areas where improvement will support a career aspiration, even if not part of the current role; and
3. Areas that must change in order to continue in the role**\***.

**\***For this category we recommend contacting your HR Partner prior to delivering the feedback. Your HR Partner is
“coach of the coach” and will help you craft your message. ***Your HR Partner can support an extension of the Introductory Period*** if in your assessment this may help the employee meet performance expectations.

Be strategic. Prioritize and list the most important first. Limiting to three means you are helping the employee focus on the most important things to positively impact their performance and/or career aspiration. You can list more – your message may get diluted the more you add. The opportunity competencies you select will be individual to the employee. They should reflect the performance you observe. It is important to use specific examples for each opportunity to demonstrate your feedback and bring clarity to the message. A method for communicating opportunity competencies is provided below.

**Sample Competencies:**

|  |  |  |
| --- | --- | --- |
| * Dedication, Attitude, Commitment
* Priority-Setting
* Problem Solving
* Initiative and Reliability
* Leadership
* Working Effectively with Others
* Communication
* Creativity and Innovation
* Marketing/Selling Techniques
* Visionary Abilities
* Administrative Skills
* Drive for Results
 | * Development of People
* Acting with Integrity
* Fostering Teamwork
* Articulation of Ideas
* Dealing with Abstract Concepts
* Quantity of Work Produced
* Analytical Skills
* Focusing on Service
* Sound Judgment & Decision Making
* Attention to Detail
 | * Technical Skill (Be Specific)
* Quality of Work Produced
* Accepting Responsibility
* Anticipation of Problems
* Applied Job Knowledge
* Creating Ownership
* Handling Multiple Priorities
* Use of Technology
* Institutional Knowledge
* Other: Department or Position Specific Competency
 |

**Competency Communication Methodology:**

**COMPETENCY HEADLINE (see sample list on previous page)**

Like the headline of a newspaper article, this word or phrase represents the competency identified. Repeating the headline while giving examples (explained further below) will bring clarity to the message. *Competency Headline* *Example: “Fostering Teamwork.”*

**CLARIFYING STATEMENT**

This is a brief phrase or sentence that describes the overall ***behavior*** you have identified with the competency headline. The key word here is behavior. That’s the clarification you are bringing to the competency headline. Clarifying statements are not always needed if the headline is clear enough. *Example: Competency Headline – “Fostering Teamwork” – Clarifying Statement - “Your ability to influence your team to work together and deliver results.”*

**EXAMPLES & IMPACT** *for each competency*

Examples are very important. They help the employee understand what you mean when you identify a competency. Examples must include:

* ***A time reference,***
* ***Description of the event,*** and
* ***Explanation of impact:*** money, people, etc.

***Strength Example****: “Last fall you led your team in the IT project and delivered the result ahead of schedule. The requester was very happy with the outcome and the team members shared with me how much fun the project was. This reflects well with those receiving our service, promotes a great working environment and by completing ahead of schedule you freed up resources for other important projects. Great job!”*

***Opportunity for Improvement Example with a request for change****: “At our February all-staff meeting I witnessed an interaction you had with a team-mate at your table. Later, other members of your team, also at that table, approached me with concern that you used that moment to voice your negative opinion about your team-mates’ work in front of others. I need you to bring your work concerns to individuals in a private setting. Doing so will help foster trust in the relationship, eliminate the discomfort of others in overhearing a private discussion and/or feeling a need to take sides, and support a cohesive team environment.”*

**Review of Initial Goals:** Review progress on any goals set during the introductory period including ***how*** he/she approached the goal and the outcomes.

**Goals for the Upcoming Year**

**IMPORTANT*: At least some of your goals should relate to the Opportunity Competencies you’ve identified!!!***

Use the S.M.A.R.T Goals format and provide a least 3 goals for the upcoming year. The employee may make goal suggestions during the first meeting which should enter into your discussion at the end of the Coaching Feedback session. This is an essential piece to successful performance at UNH. The final version of goals should appear on the form so be sure to update it after the meeting if there are changes based on your discussion of goals with the employee.

**S**pecific: What, why, and how.

**M**easureable: How will you measure?

**A**ttainable: Is it possible in the current circumstances?

**R**ealistic: Is the employee willing and able, do they have what is needed?

**T**ime bound: Schedule and deadline.

**Please return the completed and signed copies to your HR Partner**

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