

Manager's Quick-Guide for Effective Mid-Year Reviews

When should I conduct mid-year reviews?

It is best practice to conduct mid-year reviews with all staff toward the end of Q2 or the beginning of Q3 in the current fiscal year. Quarterly reviews are even better!

Why should I conduct mid-year reviews?

Mid-year reviews provide a formal opportunity for a check-in with Managers & Employees relating to: ([SHRM](#))

- Providing positive feedback regarding accomplishments
- Identifying and eliminating roadblocks to meeting expectations
- Adjusting goals if organizational or departmental needs have changed
- Discussing employee satisfaction to head off issues for valuable staff
- Providing time for Manager/Employee exchange of ideas & recalibrate

Effective mid-year reviews increase employee engagement, strengthen manager/employee relationships, and allow an opportunity to adjust to the current work environment.

Reference Material:

[How to login to LinkedIn Learning](#)

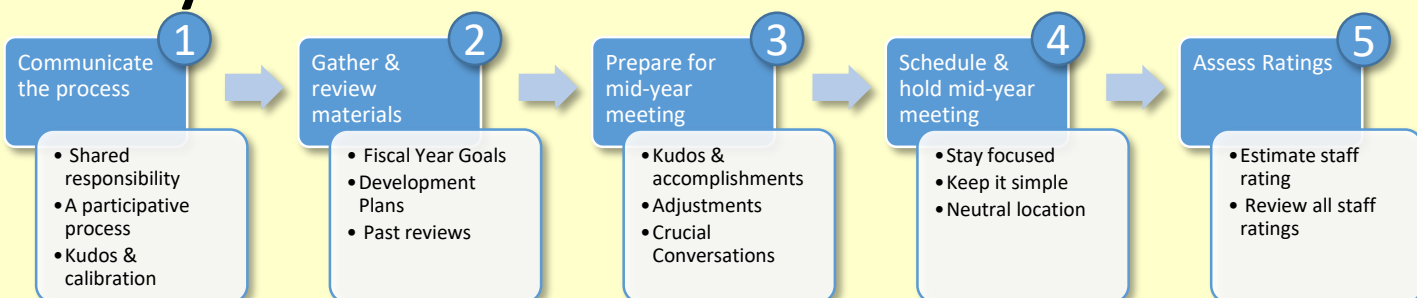
[Performance Review Foundations](#) (LinkedIn Learning)

[The Link Between Performance Management and DE&I](#) (LinkedIn Learning)

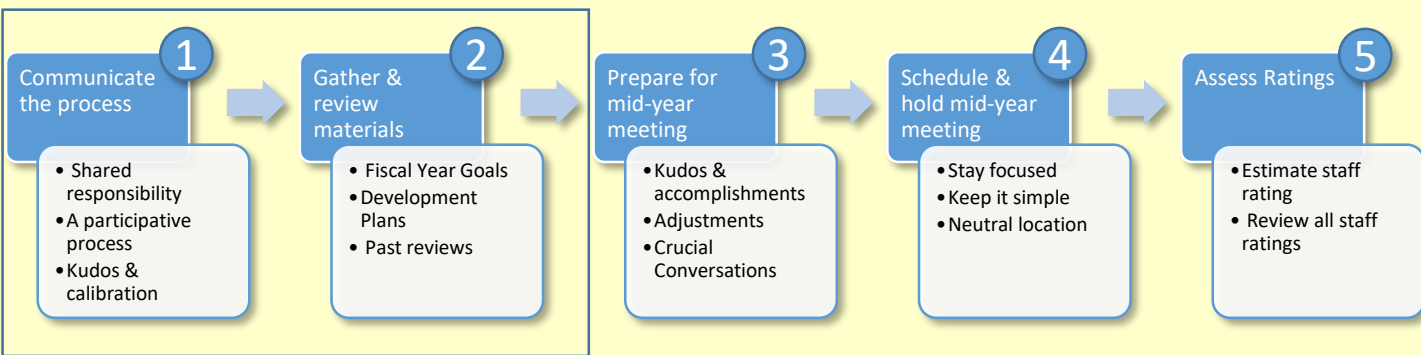
[The Manager's Guide to Accurate Evaluations](#) (Advisory Board)

[Professional Development Courses @ U-M](#)

What is the best-practice process for conducting mid-year reviews?



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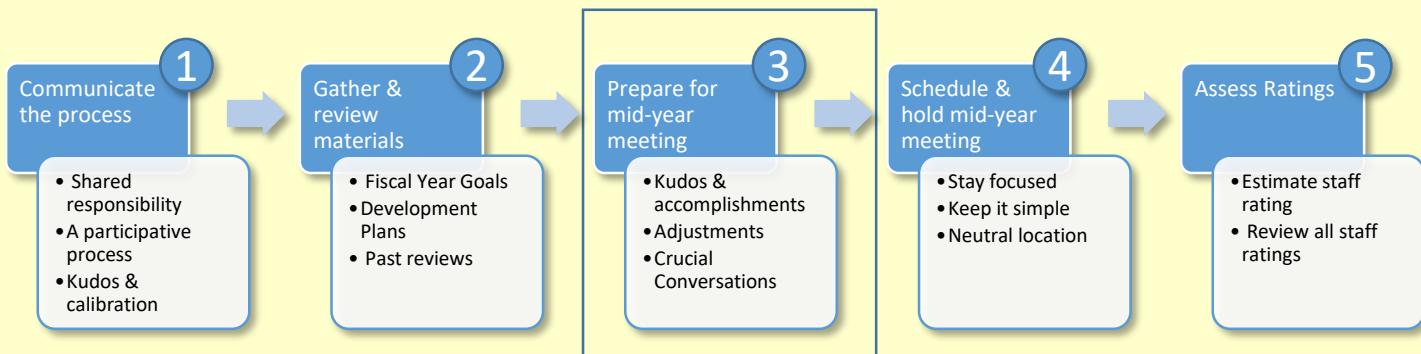
1. Communicate the process – Two Goals:

1. Strengthen conduct that leads to good performance
 2. Change conduct that pulls performance down
- **A shared responsibility** – Both the Manager and Employee should prepare for this meeting. Reference and share this [performance review preparation checklist](#).
 - **A participative process** – Both the Manager and Employee will have an opportunity to bring up bright-spots, concerns, and changes since the beginning of the fiscal year.
 - **Kudos & recalibration** – Collaboratively recognize achievements, re-calibrate goals as needed, and begin to think about 360 feedback if applicable.

2. Gather & review materials

1. Review initial fiscal year goals
2. Understand development plans and expected progress
3. Understand past trends in performance by referencing previous reviews (contact the [HRSC](#) or your HRBP for support)

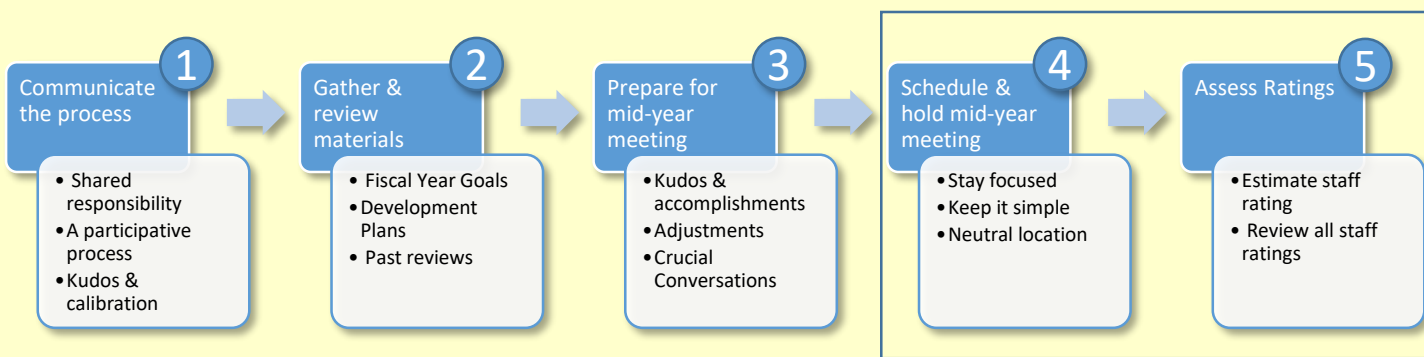
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3. Prepare for mid-year meeting with staff

1. Identify any adjustments that need to be made
2. Identify any kudos and specific accomplishments
3. Prepare for meeting with staff
 1. [Crucial Conversations Model & Worksheet](#)
 2. [Preparing an outline for delivering difficult feedback](#)
(Advisory Board)
 3. [Keeping difficult performance conversations on track](#)
(Advisory Board)
 4. [Delivering employee feedback](#)
(LinkedIn Learning - [How to login to LinkedIn Learning](#))
 5. [Giving and Receiving feedback](#)
(LinkedIn Learning - [How to login to LinkedIn Learning](#))
4. Create a meeting agenda
 1. Welcome & topics for discussion
 2. Review objectives and agree to any changes
 3. Review development plan and agree to any changes
 4. Discuss job satisfaction
 5. Summarize the meeting and agree on next steps

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4. Schedule and hold mid-year review meeting

1. Keep it simple & stay focused!
2. Hold the meeting in a neutral location if possible

5. After the mid-year meeting

1. Estimate staff rating
2. Review all staff rating estimates
3. Reference Materials
 1. [Five tips for rating more accurately](#) (Advisory Board)
 2. [Calculating percentages of staff ratings levels](#) (Advisory Board)
 3. [Adjusting staff ratings to reflect performance differences](#) (Advisory Board)
 4. [Building a case for keeping your ratings distribution](#) (Advisory Board)