

CONVERSATION GUIDE FOR MANAGERS

YEAR-END WRAP-UP CONVERSATION



UNIVERSITY OF
WATERLOO

Human
Resources

Conversation Guide for Managers: Year-End Wrap-Up Conversation

Overview

For the 2024 performance review year, we are transitioning from a formal performance process to a more informal wrap-up conversation. These conversations provide a valuable opportunity to reflect on accomplishments, identify growth areas, and set the stage for future development. By engaging in thoughtful dialogue and aligning these conversations with our [Institutional Values](#), we can continue to foster professional growth and strengthen working relationships.

This conversation guide will help you to structure the year-end wrap up conversation with your employees. Although this process is less formal than the traditional performance appraisal, it remains critical to reflect on accomplishments, identify growth areas, and plan for future success. During this meeting, it will be important to focus on required support and professional development aspirations. Please utilize the **Conversation Guide: Working Environment Questions*** to review any health and safety or accessibility needs, while discussing goals and development opportunities for the future (* available on the Performance Development webpage).

Preparing for the Meeting

Before the meeting, ensure you:

- Spend adequate time preparing for this meeting so you can have a meaningful, two-way conversation.
- Share a copy of the questions you plan to discuss in advance of the conversation.
- Determine the agenda together so both parties are clear on what will be discussed.
- Share the purpose of the conversation with the employee in advance, emphasizing the importance of reflecting on accomplishments and planning for the future.
- Choose a convenient and appropriate setting for the conversation.
- Pick a time when both of you can focus on the discussion without interruption.
- Silence any devices to reduce distractions.

Proposed Conversation Format

Estimated timing: 45-60 min.

Introduction:

- Welcome the employee warmly to put them at ease.
- Set the stage by explaining that the purpose is to reflect on the past year, align on expectations, and plan.
- Review the agenda and confirm the discussion flow.

Perspective Sharing Questions:

- What were your 3 big accomplishments for the year?
- What are you most proud of?
- Thinking about our newly launched values of Thinking.Differently?Acting.with.Purpose or Working.Together, share some examples of how you have embodied these in your work;

Skills Development:

- What skills have you been working on?
- What skills would you like to continue developing?

Goal Setting:

- Invite the employee to share their goals and objectives for the coming year.
- Collaborate on goals that are motivating, challenging, and aligned with the employee's growth, team/department planning, and our institutional values.

Support for Growth:

- How could I best support your professional development right now?
- What support do you need in the year ahead?

Looking Forward:

- As we plan for next year, what would you like to:
 - Continue doing?
 - Stop doing?
 - Start doing?
- How do these align with our values of Thinking Differently, Acting with Purpose or Working Together?

Manager Involvement:

- Where could I have been more involved in your work?
- Where could I have stepped back more to empower you to think.differently or work more collaboratively?

End on an Encouraging Note:

- Set a positive tone for the coming term, emphasizing your support and encouragement.
- Reinforce the importance of continuing to embody our values in their work moving forward.

Summary

The questions provided will help guide the discussion, ensuring you cover essential areas to support the employee’s success and well-being. This conversation is an important chance to strengthen your working relationship, align to the institutional values, and set the stage for continued engagement and growth in their career at the University of Waterloo.

Notes
