HARVARD

Month of February: Mid-year check-in discussion of SMAT goals

- During the month of February, staff and managers meet for a midyear check-in discussion about SMAT goals.
 - · Review the goals that were developed in the fall
 - Talk about how things are going
 - Update the form as needed (and list the date reviewed in the upper right side of the form)
 - Save a copy for future conversations (including a year-end review discussion)
- This should not be time-consuming; many managers use part of a regularly scheduled check-in meeting to have the mid-year conversation.
- **New employees** (who started after the goal setting phase) should participate in the mid-year check-in discussion. This is a good moment to review goals that were set upon hire, performance to date, and discuss expectations for the remaining months before the annual year-end assessment phase begins in the spring.



FY24 Performance Management

Summer/Fall 2023

Develop SMAT Goals

- •Goals form supports annual goals and review process
- •Goals form will serve as a reference for continuous conversations

Winter 2024

Mid-Year Check-In

 Regular progress meetings expected between managers and staff, including a more formal mid-year conversation

Spring 2024

Year-End Review Discussion

 At the end of FY24, the PeopleSoft system will be used to upload the form and provide end-of-year ratings*

Work on goals (and update goals form as needed)

Ongoing conversations

*Harvard University performance ratings: exceptional impact, full/consistent impact, learning/building, needs improvement

FY24 Target Dates



May to end of August 2023	 Managers and employees collaborate to develop goals and complete goals form. Save form locally to go back to throughout the year.
Month of February 2024	Mid-year Check-in discussion
May and June 2024	 Year-end review discussion Summaries documented in PeopleSoft system (more detail will be provided in the Spring)