|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **EMPLOYEE NAME** |  | | **DATE** |  | |
| **JOB TITLE & SALARY GRADE** | |  | | | |
| **SUPERVISOR NAME & TITLE** | |  | **DEPARTMENT** | |  |

1. **GETTING STARTED**

Successful conversations begin with preparation, **either the employee or the supervisor can start this process**. Before beginning the performance and development cycle review the performance & development program toolkit for supervisors and employees:

* [Performance and Development FAQ’s and Information](http://www.uvic.ca/hr/assets/docs/pdc/FAQs%20and%20program%20info.pdf)
* Performance Development Cycle – [Getting](http://www.uvic.ca/hr/assets/docs/pdc/PDC_getting%20started.pdf) started
* [Effective Feedback](http://www.uvic.ca/hr/assets/docs/pdc/Effective%20Feedback%20and%20experience%20cube.pdf)
* [Difficult and Productive conversations](http://www.uvic.ca/hr/assets/docs/pdc/DifficultProductive_conversations.pdf)
* [Coaching Questions](http://www.uvic.ca/hr/assets/docs/pdc/Coaching%20Questions.pdf)
* [Setting Key Goals](http://www.uvic.ca/hr/assets/docs/pdc/Setting%20key%20goals.pdf)
* [8 Pitfalls to Avoid for Supervisors](http://www.uvic.ca/hr/assets/docs/pdc/pitfalls%20to%20avoid%20Supervisors.pdf)

1. **IN YOUR FIRST MEETING**

Review [**University Plans**](https://www.uvic.ca/about-uvic/university-plans/index.php) and discuss **how this role contributes to UVic’s big picture**.

Discus department and individual priorities under UVic’s [Equity Action Plan](https://www.uvic.ca/equity-action-plan/index.php)

Review the **UVic** [**competency model**](https://uvic.ca/competencymodel) **for areas of focus and development**.

Review the **job description and the position’s key responsibilities**. If the job duties have changed substantially, discuss with a supervisor or Human Resources.

Explore communication styles between employee and supervisor. **How do you each prefer to** [**give and receive feedback**](http://www.uvic.ca/hr/assets/docs/pdc/Effective%20Feedback%20and%20experience%20cube.pdf)**?** What is the best way to provide recognition or clarify expectations? These discussions are much easier to have in Step One and will help to give and to receive feedback later on.

1. **SET KEY GOALS**

**Create 3-5 goals. One of which should relate to** [**UVic’s Equity Action Plan or Indigenous Plan.**](https://www.uvic.ca/about-uvic/university-plans/index.php)  Supervisor or employee can craft the first draft of goals for review and discussion. Cut/paste to add goals and the form will expand.

1. **GOAL**

|  |
| --- |
|  |

**TIMELINE AND SUPPORT**

|  |
| --- |
|  |

1. **GOAL**

|  |
| --- |
|  |

**TIMELINE AND SUPPORT**

|  |
| --- |
|  |

Cut/Paste to add room for more goals, or if you use a different goal setting template attach your own goals document to the Step One form.

1. **IDENTIFY A LEARNING PLAN**

**Develop a learning plan to support the goals identified.** Include what and how learning will occur and what support will be provided. For example: attending workshops, conferences, [employee learning calendar](http://uvic.ca/hrcalendar), cross training or stretch assignments.

|  |
| --- |
|  |

1. **PLAN REGULAR STEP 2 CHECK-IN MEETINGS**

**Determine the frequency of your STEP 2 check-in conversations** and schedule these into your calendars. Use the [STEP 2 forms](http://www.uvic.ca/hr/assets/docs/pdc/PDC_Step2.docx) to capture notes from your check-in conversations.