

THE NON-TEACHER END-OF-YEAR CONFERENCE

The End-of-Year Conference is the final conference of the appraisal cycle, during which appraisers discuss ratings and performance with employees. Prior to the conference, the appraiser will submit ratings to each employee in OneSource Me.

After the employee has been allowed a minimum of five days to review the appraisal, the manager may schedule the conference. Each employee's appraisal is based on two primary components: **Competencies and department goals.** The appraiser should begin the process by reviewing both components.

Competencies will account for 70% of the final appraisal rating for all non-teacher employees. The majority of district employees are evaluated based on the standard competencies. However, certain employee groups are linked to job-specific competencies. Refer to the [rubrics](#) on the [Performance Management website](#) for additional information. The rubrics provide managers with indicators for each performance level. These will be helpful in assigning a fair and unbiased rating for each competency. **Review each competency and gather any evidence to support accurate ratings.** These ratings will later be entered into the appraisal document in OneSourceMe.

Department Goals will account for 30% of the final appraisal rating for all non-teacher employees. Each appraiser should have assigned a minimum of two and a maximum of six department goals to each of their direct reports during the goal-setting process. The system will not allow appraisal documents to be completed unless employees are rated on a minimum of two department goals. **Review each department goal and gather any evidence or data to support accurate ratings.** These ratings will later be entered into the appraisal document in OneSourceMe.

In addition to ratings, the appraiser will have the option to include comments on each competency, each department goal, and may also include overall comments. This portion of the appraisal document is an excellent opportunity to provide the employee with helpful feedback. **Any notes that the appraiser may have taken during the appraisal year will be helpful in completing these sections.**

The appraiser should also gather the employee's **previous year review and current year self-assessment if available**, in addition to any **development plans, notes, or feedback** that may have been collected throughout the current year.

Record observations about job performance as objectively as possible and tie your conclusions to hard data. (Harvard Business Review Staff, 2015)

CONDUCTING THE NON-TEACHER END-OF-YEAR CONFERENCE

Effective End-of-Year Conferences can be structured in many ways. The following agenda reflect one approach to structuring the End-of-Conference.

AGENDA (SAMPLE)

Set the Tone

- Welcome the employee and state the purpose of the conference.
- Set a tone of partnership by limiting distractions and informing the employee that his/her input is a valuable part of this process.

Self-Assessment

- Invite the employee to talk about their self-assessment (if available). This will help you understand the employee's perspective and avoid controlling too much of the conversation.

Practice Active Listening

- Avoid interrupting, demonstrate that you are paying close attention by periodically paraphrasing what you've heard.

Discuss Employee Performance

- Three key elements that an appraiser may want to discuss are strengths, opportunities for improvement, and goal attainment.
- Prior to the conference, "*Attempt to jot down at least three things the employee has done well over the course of the past year, and the two areas where performance most needs to improve.*" (Grote, 2011). Following this advice will provide the manager with a clear focus for the conference.

Discuss the Employee's Development Plan and Upcoming Goals

- Discuss competencies to be developed and upcoming goals.
- Consider what aspects of the IPDP were achieved and which development goals may need to be carried over to the next appraisal year.

Next Steps and Closing

- Ensure the employee's appraisal is complete and signed, or on track for completion by the appropriate due date based on the employee's duty schedule.