Manager Responsibilities Before and After the Staff Performance and Development Review

Before the dialogue

Managers have different types of responsibilities in the preparation:

- The responsibility to familiarise themselves with the individual staff member’s current situation. You must be up to date on the individual staff member’s specific tasks, responsibilities, plans, prerequisites, motivation as well as their strengths and weaknesses. (This may be done by having an updated job description and by reviewing any agreements made in the previous staff performance and development review.)

- The responsibility to make strategy, goals and visions more concrete and visible to the staff member. You must familiarise yourself with strategy, goals, future requirements and development needs. You should consider your team’s goals and development needs, and how the team’s cohesion and competence needs relate to the overall strategy for the unit.

- The responsibility to investigate whether new development goals, development plans and competence development activities are needed as well as what opportunities there are. You must consider whether it is realistic to accommodate the individual staff member’s specific requests for competence development.

- The responsibility to articulate what you want out of the dialogue: what development needs you see for the unit and for the individual staff member and how you can explore this in the dialogue. At the beginning of the meeting, you must be able to articulate: "We conduct staff development and performance reviews because... And this year we are focusing on..."

It is the manager’s responsibility to communicate these frameworks and expectations to the staff member so that together you can focus on how the connection between the staff member’s tasks and development contributes to the overall development of the unit. It is important for the staff member to know what the organisation ‘wants to do with’ the individual staff member, can see meaning in it, feel competent to carry it out and thrive in this situation. When managers are able to communicate this direction clearly, it helps the staff member feel seen and acknowledged in terms of the four needs, and motivated to develop. That way, the staff member’s development is linked to the goals and development of the organisation and the unit, and the review becomes a conversation that ties the individual, the work community and the organisation together.
Invitation to the staff member

Send out an invitation to the staff member no later than two weeks before the review. You may use the AAU invitation template or formulate your own.

If you formulate your own, you should do the following:

- Formulate your expectations for both the staff member’s preparation for the dialogue, its content and output, as well as the follow-up. You can start with the AAU invitation template and add relevant information for the particular staff member.
- Remember to attach the preparation sheet with the ‘dialogue compass’ that the staff member must prepare and the guide for filling out the vitalisation compass.
- Tell the staff member that the vitalisation compass is a tool that provides a holistic picture of the staff member’s work life as currently experienced, and that is based on the four basic psychological needs. It is important that you make clear that it is not a test or an objective evaluation tool.
- Also, explain that there is no expectation on your part or on the part of the organisation that the staff member share personal matters or considerations during this process if they do not want to.
- Formulate your considerations about the unit’s strategy, goals and development needs, so that the framework reflects aligned expectations in advance of the conversation with your staff member.

Set aside 1½ -2 hours for the dialogue.
After the review

Managers are responsible for entering the development plan in the personnel case (case group 221) with insight for the manager and the staff member. This plan can thus be used to follow up on the agreements and to prepare for next year's staff performance and development review.

Follow-up on the individual staff member

After the meeting, it is important to follow up on the agreements you and the staff member made so that together you ensure the staff member's development. You can follow up on dialogues in different ways, and managers and staff members may have different wishes for follow-up. There may also be organisational, cultural and structural frameworks that influence how managers best agree on follow-up with staff members. Some want to set dates for follow-up in the calendar (e.g. 1:1 talks, mini-reviews, or follow-up talks). Others also need a more ad hoc follow-up (informal meetings at the coffee machine, or that the staff member returns to the manager when they have explored opportunities competence development or follow-up on other agreements). However, it is important that both manager and staff member follow up so that you ensure the individual's development and learning as well as the organisational learning.

We recommend that you go over the agreements you and the staff member made no more than one month after the meeting. You can meet again on an ongoing basis, either on an agreed frequency or again after six months at the latest. In following up, you take stock on how far you have now come and how far you are from achieving the goals you agreed on in the development plan. You can also assess together whether it is still realistic to achieve the goals or whether something has happened that changes the plan and requires adjustments. Finally, you and the staff member can discuss whether they have learned something new and how they used the new information in their work.

When following up on the dialogue, the staff member can both see and feel the manager listened to their feelings about the work situation, and they will see forward movement on the development goals. Thus, the staff performance and development review will create value.

Follow-up on the team and the unit

In addition to following up on the individual staff member, managers can also follow up on their team and the team's overall development. You can summarise development wishes and needs for all the staff members in the team by analysing the themes that recur in the individual dialogues and that are relevant for the group to work on. Once you have this overview, you can give the team an overview of the agreements on individual competence development and the common development wishes and needs that you have seen in the dialogues. You can convene a joint follow-up meeting or present these issues at a regular team meeting. Give a general overview of the issues that arose during the dialogues and how they connect to the overall organisational and development perspective.

Due to confidentiality issues, it is essential that no specific content from individual dialogues is disclosed. Furthermore, individual teams may follow up by conducting group performance and development reviews where future themes and areas of development may be coordinated and embedded. This may also include a plan for how to follow up on development activities.

Managers should also follow up in relation to the workplace. You can address the same considerations about development wishes and needs of the workplace as you did for the team. Based on this, management group can together consider whether initiatives are needed across the workplace or whether there are themes that you need to address together.