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Answers

**How do I approach GOAL 2.0 with an employee who reports to, or does work for, two or more managers?**

If there is a dual reporting relationship, both managers will want to ensure they are aligned in terms of the priorities that each have for the employee. They can each engage in quality conversations individually with the employee through the year and continue to communicate with each other. For the performance summary, they will want to coordinate the timing but hold the summary conversations separately.

If it is a matter of an employee receiving more direct supervision from an individual other than the designated manager, it will be the designated manager that holds the Performance Summary conversation but with direct input from the individual providing supervision. If the employee is in agreement, having that individual in attendance would be most effective.

**How frequently should I have each quality conversation with each employee?**

It really depends on the context of your work and the number of employees you have. Some managers can do a daily or weekly check-in, while others can aim for a monthly check-in. A feedback/feedforward conversation is best held as soon as there is feedback that needs to be shared. It is best to keep in mind that the more often you can have a quality conversation the stronger your relationship with your employee will be, and that is one of the biggest contributors to employee effectiveness.

**What is the difference between GOAL and GOAL 2.0?**

The end of the year review, that could be quite time-consuming, has been replaced by a Performance Summary conversation that applies to almost all employees (see above for exceptions) and is guided by a 2-page template. This summary will draw from notes that have been made of highlights, outcomes, decisions from quality conversations that take place through the year between the Manager and employee. Those conversations, and the skills with how they are conducted, are now the focus. This ensures that managers and employees are communicating on a regular basis so expectations and priorities can be adjusted as needed, information and ideas are exchanged regularly.

**Do the quality conversations need to happen in a certain order? Are any of the quality conversations more time sensitive?**

The performance summary conversation is best carried out at the end of the fiscal year – between the end
of April and the end of May. The objective setting conversation is best carried out between May and September as it provides clarity to employees regarding the priorities and expectations for the year. This will depend on when the unit or department does their planning, as you want to ensure that the employee is aware of the next level objectives and how their work contributes to the overall success.

Do we have senior leader support for GOAL 2.0?

Yes. Our Sr. leaders have been informed about GOAL 2.0 and there is widespread support for its implementation.

Does GOAL 2.0 apply to all employees and managers at the UofG?

Faculty and Librarians at the UofG have a performance process that is unique to their roles. With the exception of CUPE members, GOAL 2.0 applies to all other employees.

Is GOAL 2.0 mandatory?

Supporting employee performance is an important component of all managers’ and supervisors’ work. Applying fair and equitable practices across campus is good leadership and the GOAL 2.0 framework and tools enables this. Except where there are other frameworks identified, e.g. with UGFA, or exceptions (CUPE) it is expected that Managers will use the practices, tools and processes outlined in GOAL 2.0.

There are many strategic initiatives underway at U of G (wellness @ work, diversity and inclusion, etc). How does GOAL 2.0 fit in with these strategies?

Each of the initiatives are guided by their specific objectives and governance structure. However, there are shared principles and interests, most specifically related to ensuring our workplace is respectful, inclusive and engaging and that each person’s safety and well-being are paramount as they contribute to the university. The skills of Connect, Adapt and Align and having Quality Conversations very much support the shared principles and interests.

Where do I take notes on my conversations with employees? What if it’s something serious?

Each manager can choose their preferred method for keeping notes of highlights, decisions, actions that come out of a quality conversation. A spreadsheet or a table will work, or sharing an email that briefly summarizes. Not all conversations will require it, so managers will use their own discretion. It could also be helpful to have the employee summarize in an email.

Documentation is required when a performance challenge has been identified. If it is a serious incident or an ongoing issue that needs to be addressed, two things are important to attend to: 1) contact your HR Consultant to get input on what action and documentation is required; and 2) the incident or issue is written down with sufficient detail, accompanied by details of the agreed upon action to be taken.

Who initiates GOAL 2.0 and the two-way conversations through the year?

It is the Manager’s responsibility to support their employees’ performance so it follows that the Manager would most often be the one to initiate Quality Conversations, which are two-way conversations. However, this does not preclude an employee from initiating a conversation with their manager when required. Asking for what you need is a positive element of effective self-management.
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