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**Dialogue for Success Record FY21**

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| **SECTION ONE: INSTRUCTIONS** | | | | |
| Name: |  | | Team |  |
| Job Title: |  | | Supervisor: |  |
| Performance Period: | From: | To: | Next Scheduled Dialogue: |  |
| **INSTRUCTIONS:** The purpose of this form is to document that the following topics have been explored. In preparation for the dialogue, ensure that the supervisor and staff member have received and understand the following documents:   1. Staff member’s current position description: [INSERT LINK TO JOB DESCRIPTION] 2. Staff member’s current goals and objectives (individual and/or team): [INSERT LINK TO GOALS] 3. Learning Forward’s staff agreements: [INSERT LINK TO STAFF AGREEMENTS] | | | | |
| **SECTION TWO: DIALOGUE TOPICS** | | | | |

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|  | | **Topic Explored** |
| 1. Staff member’s performance on major position responsibilities over the past year.   Notes: | |  |
| 1. Staff member’s progress toward the achievement of his/her organizational, individual and/or team goals   Notes: | |  |
| 1. Staff member’s strengths and/or areas for growth, per Learning Forward’s staff agreements.   Notes: | |  |
| 1. Contributors and barriers to effective work performance and job satisfaction; what the staff member needs from you (the supervisor) to be more effective in his/her job.   Notes: | |  |
| 1. Possible work process improvement ideas suggested by staff member based on experience doing the job.   Notes: | |  |
| 1. Staff member’s professional learning (over the past year; future needs for current job; long-term goals and development needs to achieve them).   Notes: | |  |
| 1. Individual and/or team goals for the next review period, as well as necessary revisions to current job description.   Notes: | |  |
| 1. Anything else the staff member or supervisor would like to explore.   Notes: | |  |
| Performance Improvement Plan Required: | **YES** | **NO** |

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| **SECTION THREE: COMMENTS AND SIGNATURES** | |
| Supervisor’s Comments: | |
| Staff Member’s Comments: | |
| I have received regular feedback on my performance during the year:  Yes  No  I acknowledge that each of the performance topics listed above were explored:  Yes  No | |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Staff Member’s Signature | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Supervisor’s Signature | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date |

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**Staff Preparation for Dialogue for Success**

The purpose of these questions is to stimulate your thinking regarding your performance over the past year in preparation for your Dialogue for Success meeting with your supervisor. You may chose to write your responses to these questions, but it is not necessary, nor are you required to submit anything in writing. Before considering the questions below, please make sure you have the following documents:

1. Current position description: [INSERT LINK TO JOB DESCRIPTION]
2. Current goals and objectives (individual and/or team): [INSERT LINK TO GOALS]
3. Learning Forward’s staff agreements: [INSERT LINK TO STAFF AGREEMENTS]

**JOB PERFORMANCE**

1. Summarize your primary achievement(s) over the past year as they relate to the execution of your major position responsibilities and your collaborative, organizational and personal/professional goals.
2. Where do you think you excelled during the past year? For example, did you:

* Solve crucial problems?
* Successfully implement new ideas?
* Make improvements to processes or procedures?
* Complete a particularly challenging assignment?
* Develop revenue-generating or fund-raising ideas?
* Find ways to control or reduce expenses?

1. If you did not achieve all of your stated goals and objectives, what would you list as the reasons?
2. Which of Learning Forward’s staff agreements are particular strengths for you, and which (if any) require more conscious effort on your part to achieve (and may represent a development opportunity)?

**PROFESSIONAL GROWTH**

1. What progress have you made in your job performance or job knowledge in the past year?
2. Are you optimizing all of your strengths in your current role? Please explain.
3. What additional competencies do you need to enhance your performance, results, and professional growth?
4. Is there anything that your supervisor or Learning Forward can do to help you optimize your performance, results, and professional growth?
5. What lessons did you learn this year and how will you apply them going forward?