*Please note:* The documents in our online resource library are *samples for reference only* and do not constitute legal advice. Your organization should consult an attorney or seek necessary counsel before adopting legal documents.

**RDI Performance Coaching Process**

RDI has a twice-yearly performance coaching process to allow for more frequent feedback/ conversations rather than a formal once per year conversation. Our goal is to create a more efficient and effective process for supervisors and employees resulting in more meaningful performance conversations with staff. The goal is to have forward-focused dialogues with staff.

**Part 1 - Regular Check-ins or One-to-one Conversations**

* Supervisor to schedule with staff
* Monthly preferred; quarterly at a minimum
* Employee driven process to meet their needs
* 15 to 60 minutes in length
* In person ideal, virtual okay, visual contact preferred
* Topics to be discussed:
  + A few highlights of work the past month – where did you really shine
  + Discuss work plan and priorities – focus going forward
  + Areas where help is needed – self or community level
  + Ideas, questions, suggestions moving forward
  + What can RDI do for you
  + Review of professional development goals and activities – focus moving forward

**Part 2 - Performance Conversations and Career Path Planning –**

**Two times per year: May and November**

(Note: Attach docs to meeting calendar invite when possible.)

In advance of the meeting:

1. Staff sent the below questions

* What do you feel good about/what did you accomplish during the last six months?
* What keeps you working here?
* What would make your job more satisfying?
* Are there any threats to your job performance, working here, or overall job satisfaction?
* What do you want/need to learn at RDI, and what support do you need?

1. Supervisor addresses/asks the below questions

* Highlight 2-3 areas of strength from past six months
* What does RDI need from you? (e.g., a new area of assignment or improvement)
* What can I do to best support you?
* What’s next to help employee grow and develop?

1. Both the Staff and Supervisor are sent the previous Action Plan for Development in order to prepare for conversation. Each should:

* Review progress from last plan and
* Generate ideas for new goals and document on draft Action Plan for Development

At the meeting:

1. Both share answers to the questions and have an honest, open dialogue.
2. Co-design a new Action Plan for Development for the next six months.

After the meeting:

1. Employee finalizes their new Action Plan based on the meeting agreements and emails to SV.
2. SV adds a comment and emails final doc to the employee and Executive Director, and cc’s the Finance Director (for storage—not reading).

**Actions Plans are due 6/30 and 12/31.**