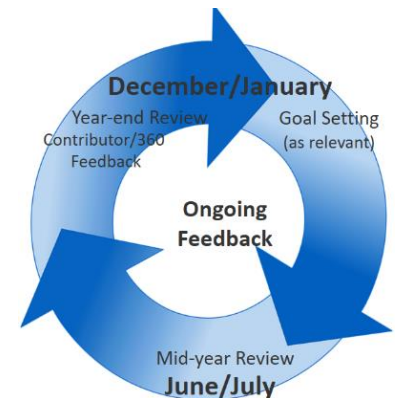


GracoRoberts Performance Review

Mid-year Check-In- Employee Reference Guide

What is Performance Management at GracoRoberts?

"Performance management is a continuous process that helps employees meet organizational goals and objectives. It involves communication between managers and employees to clarify expectations, set goals, and provide feedback during a defined period. The goals are to improve employee performance, grow individual capabilities and maximize the value they create for the organization."



Mid-Year Review Process and system overview:

The Mid-Year Check-In is a short review to assess how things are progressing so far (Jan-July), with a brief reflection on performance—both on what has been achieved and how it has been delivered.

- The Employee provides a brief overview on their performance YTD and feedback for their manager.
- The Manager provides an overview on performance feedback from Jan-YTD, and provides specific feedback on successes and areas for improvement. In addition, the manager chooses a Flight Status as of this point in time.
- The mid-year performance conversation during a scheduled 1:1 and in a private space.
 - Includes a discussion on goals/focuses for rest of year.

GracoRoberts Performance Rating- FLIGHT STATUS

Flying High	• Exceeds Expectations: Always surpasses goals. • Top Performer: Delivers exceptional results consistently. • Role Model: Works well with others, takes initiative, and follows company values. • Proactive: Suggests improvements and spots missed opportunities. • Recognized: Acknowledged for contributions and customer interactions. • Go-To Person: Reliable source for answers and support.
Straight & Level	• Delivering great work and making important contributions to the company. • Consistently meets and/or delivers on targets, goals and objectives. • May include special instances of Flying High or Experiencing Turbulence. • Meets behavioral expectations and effectively demonstrates company values; is both accountable and reliable; respectful in interactions. • Effectively demonstrates and performs to the position requirements and expectations.
Experiencing Turbulence	• Does not consistently demonstrate understanding or adherence. • Inconsistent with delivering and/or performing the position's expectations and/or behaviors. • Not delivering expected results. • May be unreliable or struggling with a particular responsibility and/or expected behavior.
Taking-Off	• New starter -introductory period (applicable within 6 months of new role/responsibility).

- Learning the position, new responsibilities, behaviors, skills and/or capabilities.

ExponentHR:

In ExponentHR, the mid-year review will be logged in the Performance Management functionality.

Performance Management  Options ▾

Review Year: 2026 ▾
 View As: Select Employee ▾ 
 Show: Team Reviews ▾

☒ Active
 ☒ On Leave*
 ☐ Terminated*

Outstanding Tasks
Goal Management
Reviews
Employee Dashboard

Review Status
 No Status Data Available

Ratings
 No Ratings Data Available

Review Status:
All Outstanding ▾

Template / Group:
All ▾

Actions ▾

Reviews

No records match current filter

1. Employees will be prompted by email to complete the mid-year performance review.
2. Employees complete the Overall performance review box YTD (Jan-July)
In this mandatory section, provide a brief paragraph summarizing your performance to date. Include a check-in on your goals or KPIs, outlining progress against targets, any challenges encountered, and any adjustments needed to ensure you remain aligned with overall objectives. Remember to think about the 'What' and the 'How' not just results achieved but how you achieved them through behaviors and company values.
3. Employee to provide Feedback to Manager.
Please provide feedback for your Manager from the year so far, what have you appreciated, where would you like more support?
4. Managers will be prompted by email to complete employees Mid-Year Check-In YTD.
In this section, provide a brief paragraph summarizing the employees performance to date.
5. Manager to comment on what's going well.
Highlight strengths and accomplishments of performance and/or behaviors since January. Share feedback on goals/objectives/KPIs.
6. Manager to comment on areas for improvement.
Identify if there are any areas for improvement and/or growth to be focused on for the remainder of the year.
7. Manager to provide a current flight status for YTD performance.
Provide a Flight Status based upon demonstrated performance and behaviors for the first half of this year. The purpose of the Flight Status is to let the individual know where they stand at this point in the year.
8. Hold Mid-Year Check-In conversation(s).
A two-way conversation where both employee and Manager talk through their commentary, not to read out what was written but have a two-way conversation on it, ensure that comments are understood, ask questions, talk through areas of focus for clarity. Manager to talk through Flight status decision.
9. After the performance conversation takes place, both the Manager and Employee must sign off the review.

PeopleHR (Silmid-UK Employees):

In PeopleHR the mid-year conversation will be logged using the Logbook functionality. The logbook is called **Mid-Year Review**. Employee or Manager can create a new log by clicking on the **+** icon.

1. Employees complete the Overall performance review YTD (Jan-July).

In this mandatory section, provide a brief paragraph summarizing your performance to date. Include a check-in on your goals or KPIs, outlining progress against targets, any challenges encountered, and any adjustments needed to ensure you remain aligned with overall objectives. Remember to think about the 'What' and the 'How' not just results achieved but how you achieved them through behaviors and company values.

2. Employees provide feedback for their Manager.

Please provide feedback for your Manager from the year so far, what have you appreciated, where would you like more support?

3. Managers can also add commentary to Overall performance review YTD.

In this section, provide a brief paragraph summarizing the employees performance to date.

4. Manager comments on what is going well YTD.

Highlight strengths and accomplishments of performance and/or behaviors since January. Share feedback on goals/objectives/KPIs.

5. Manager will comment on areas for improvement.

Identify if there are any areas for improvement and/or growth to be focused on for the remainder of the year.

6. Manager to select current flight status for employee YTD.

Provide a Flight Status based upon demonstrated performance and behaviors for the first half of this year. The purpose of the Flight Status is to let the individual know where they stand at this point in the year.

7. Hold Mid-Year Check-In conversation(s).

A two-way conversation where both employee and Manager talk through their commentary, not to read out what was written but have a two-way conversation on it, ensure that comments are understood, ask questions, talk through areas of focus for clarity. Manager to talk through Flight status decision.

8. Manager must tick to confirm conversation has taken place.

9. Both the Manager and Employee must sign the review after the conversation has taken place.

The screenshot shows the 'Mid-Year Review' form interface. At the top, there's a header 'Mid-Year Review' and a tab labeled 'Info'. Below the tab is a large text area for 'Overall Performance Review (Mid year) *'. This is followed by a section for 'Employee - Provide feedback for your Manager' with a text area. Then, a section for 'Manager - What's going well for the employee?' with a text area. Next is 'Manager - Areas for improvement for the employee?' with a text area. Below that is a dropdown menu for 'Manager- Current flight status for employee?' with 'Select' as the current option. At the bottom, there is a checkbox labeled 'Has the conversation taken place?' which is currently unchecked.

Roles and responsibilities:

- Manager's role:
 - Owns the performance review process throughout the year including flight statuses.
 - Sets direction (goals) and communicates performance expectations and feedback.
 - Listen to the employees' feedback and concerns.
 - Understand and can explain Flight status.
- Employee role:
 - Provides feedback on their own performance YTD and feedback for manager.
 - Prepares for the performance conversation.
 - Participates and is engaged in the conversation.

Goal Setting:

Please see the video on goal setting – [click here](#).

When setting goals or working towards goals, it is important to remember:

1. Alignment: Ensure goals align with the organization's objectives.
2. Planning: Identify tasks, resources, time, and support needed.
3. Goal Setting: Set and communicate SMART goals.
4. Shared Success: Agree on what success looks like and ask questions.
5. Logging Goals: Record goals using tools like Excel, Asana, Office Planner, or HR systems.
6. Tracking Progress: Track progress and provide feedback.
7. Flexibility: Be open to adjusting goals as needed.
8. Accountability: Celebrate milestones and acknowledge achievements. Correct the course when necessary.