

# EFFECTIVE PERFORMANCE DISCUSSIONS REVIEWER CHECKLIST

## **B E F O R E**

### SCHEDULE

- Confirm dates/times for all staff discussions
- Secure a private, interruption-free location
- Allow for 45-60 minutes minimum

### COMMUNICATE

- Notify individuals two weeks before
- Provide date, time and location
- Share a brief agenda to clarify expectations
- Set a due date for when you need to receive the employee's draft Goal Agreement and the review form that includes the employee self-assessment
- Encourage the employee to prepare by using the Employee Checklist
- You may choose to provide the written review in advance to avoid the discussion time being dominated by the employee reading the review

### PREPARE

- Create an outline
- Review last year's performance review and job description
- Finalize your input on the employee's draft Goal Agreement
- Prioritize critical discussion points for each section of the review
- Reference specific examples to illustrate points
- Talk with your supervisor and/or your HR Client Partner if you anticipate problems or need coaching

## **D U R I N G**

### SET THE TONE

- Create a positive atmosphere in which open and honest discussion is welcome
- Review the purpose of the meeting and ask the employee if other topics should be included

### LISTEN

- Encourage the employee to participate by asking open ended questions; avoid dominating the conversation
- Invite the employee to ask questions, raise issues or concerns and give you feedback
- Paraphrase and summarize what you hear

### LOOK BACK

- 25-35% of discussion should focus on the past
- Review overall rating, achievement of goals, and assessment of performance against key factors
- Recognize significant accomplishments and contributions

### COACH

- Provide meaningful recommendations
- Phrase feedback constructively

### LOOK AHEAD

- 65-75% of discussion should focus on the year ahead
- Discuss goals and Professional Development Plan
- Clearly state expectations for each performance factor
- Close by asking for feedback on what you can do differently to support the employee

## **A F T E R**

### DOCUMENT

- Note the employee's feedback about your performance/support
- Track your commitments and follow through on agreements

### FOLLOW UP

- Establish quarterly or mid-year checkpoints and schedule them immediately after the discussion
- Revisit established goals and development areas on a regular basis both formally and informally
- Provide timely feedback. Deliver praise and constructive feedback in the moment

### ASK

- Check in with the employee periodically, ask them to track their goal progress and engage them in taking initiative to seek feedback
- Regularly encourage feedback from the employee about how you can provide support

### ACT

- Recognize and reward successes—big and small (in public or privately, depending on employee preference)
- If progress on goals and development areas is slow or off track, revisit, revise or counsel the employee immediately—it's your job
- Seek assistance from your supervisor and/or HR