**Preparing for the Performance Conversation**

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| Step 1: Reflect on Your Performance | **Your performance can affect your employee. Have you:**   * Maintained a regular meeting schedule and open, two-way communication * Provided timely feedback * Identified ways the employee can develop and improve * Removed barriers where possible * Supported your employee by providing training, equipment, supplies, and encouragement |
| Step 2: Gather Relevant Documentation | * Job description * Notes from regular update meetings * Written reports submitted by your employee * Copies of correspondence that you or your employee received * Input from others who have worked with your employee * Training courses your employee has taken * Notes regarding any corrective action you have taken * Successes or failures of note * Current projects the employee is working on and employee’s progress * Examples of work problems you want to discuss * Examples of employee’s work over the past year and recent work * How employee related to coworkers, internal and external customers, and others |
| Step 3: Prepare Yourself | * Review the documentation you have gathered * Compare the employee’s actual performance to the goals/expectations. Ask yourself:   + What performance expectations were met? Exceeded? List specific examples.   + Are there any areas where the employee did not meet expectations? List specific examples and have sufficient examples to support this feedback. What can be done to improve performance?   + Am I looking at performance over the entire evaluation period?   + What factors may have affected performance? What factors may have been beyond the employee’s control?   + Were expectations reasonable? Attainable?   + How have I formed my opinions about the employee’s performance? Have I been fair and objective? * Draft the performance evaluation form * Assess overall performance and use specific examples and facts in your comments describing the level of performance * Think through the conversation you will have—rehearse if you have to provide constructive feedback |
| Step 4: Prepare the Employee | * Schedule a date/time and a suitable private location for the performance discussion and notify the employee well in advance * About two weeks prior to the scheduled meeting time, ask your employee to complete the self-appraisal or performance evaluation form. * Provide the employee a copy of last year’s performance evaluation which includes the criteria for the evaluation and goals for the year. * Provide the employee with a copy of his/her job description, if needed. |

**Additional items for thought as you gather information:**

* Ask yourself, “What message do I most need to convey? What will help and motivate my employee to do his/her best”?
* Focus on the *trends* that have emerged across the performance period, rather than be overly influenced by high-profile incidents and exceptions. Consider:
  + What *best characterizes* the employee’s contributions and approach throughout the year?
  + Is performance trending up? Down? Should this have a bearing on the rating?