**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
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| 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
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| 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
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| 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.
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**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?