

## **Outline for Conducting an Effective Performance Review**

### **Prepare yourself and your employee.**

- schedule ample time and a private place for the discussion
- notify the employee in advance, in writing
- review documentation (notes, letters, files, etc.) before working on the review
- remember that performance management is a key service to your employees and unit

### **Make it “priority time.”**

- create an agenda for the meeting
- minimize interruptions

### **Set a tone of collaboration.**

- start the discussion on a positive note
- encourage your employee’s participation

### **Be clear about your purpose.**

- reinforce that the discussion will address strengths and areas for improvement

### **Review performance expectations.**

- discuss the position description, units’ reasons for needing the position
- be clear about performance standards within your unit

### **Discuss performance that is below, meets, and exceeds expectations.**

- use language that is clear and specific; use examples
- describe performance, not personality

### **Ask employee what he/she thinks.**

- allow employee to speak freely before responding to his/her comments
- actively listen to your employee
- clarify your employee’s concerns, then address them

### **Set goals to:**

- improve performance in targeted areas
- build on strengths
- develop the employee’s knowledge, skills, and abilities
- align the employee’s work with the needs of the unit

### **Agree to follow up.**

- schedule at least one interim check-in on performance during the year
- ask how your employee prefers to receive feedback (written, verbal)
- discuss how your employee likes to be recognized for good work

### **Close with encouragement.**

- offer your help and support
- end on a positive note by summarizing employee strengths and contributions