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