# Performance Review – Best Practices

**Pre-Performance Review Meeting:** Before scheduling a meeting with the employee, the following suggestions can be helpful with planning

- Identify a confidential location
- Identify a time period you will not be disturbed (e.g. no phone calls, no interruptions, etc.)
- Before you begin, ensure your emotions are not heightened, so you can objectively focus on the employee and their performance with a positive tone, and show them appreciation
- Be sure you are prepared to discuss each area of performance, and be prepared to justify ratings
- Prepare yourself to be encouraging, objective, non-judgmental and constructive

**Employee Performance Review Meetings: Suggested Steps**

<table>
<thead>
<tr>
<th>Step 1: Ask employee his/her perception of performance over past year</th>
<th>Step 2: Review established goals from previous year</th>
<th>Step 3: Review performance element ratings</th>
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</thead>
<tbody>
<tr>
<td>- Actively listen to employee’s perspective</td>
<td>- Address each goal and discuss whether or not they were accomplished</td>
<td>- Address each element and rating</td>
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<tr>
<td>- Acknowledge known accomplishments</td>
<td>- Actively listen to employee’s perception of each goal</td>
<td>- Discuss each rating and reasoning behind each rating</td>
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<td>- Seek clarification on the employee’s perception of their accomplishments if necessary</td>
<td>- Discuss pros and cons of the work accomplished on each goal</td>
<td>- Actively listen to employee’s perception of each rating</td>
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<td>- Provide objective feedback from a leadership perspective of each goal</td>
<td>- Provide objective feedback from a leadership perspective of each rating when necessary</td>
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<td>- Reinforce positive accomplishments</td>
<td>- Reinforce positive ratings</td>
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<td>- Discuss inadequate accomplishments by focusing on ways to improve (listen to employee’s ideas on how to improve, and provide ideas and options from a leadership perspective on how to improve)</td>
<td>- Discuss areas needing improvement by focusing on strategies to improve (listen to employee’s ideas on how to improve, and provide ideas and options from a leadership perspective on how to improve)</td>
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<td>- Review overall rating and provide explanation and justification of rating</td>
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**Step 4: Review overall comments**

- Emphasize strong performance areas (e.g. how employee adds value, strong member of team, solid competencies, etc.)
- Identify areas of opportunity (e.g. where employee can focus development)
- Actively listen to employee’s ideas of their performance and allow them the opportunity to document their comments

**Step 5: Discuss and develop an IDP**

- Use information from Step 4 to document ideas of continuous improvement (e.g. identify stretch goals/assignments, opportunities for T&D, opportunities for mentoring, etc.)
- Actively listen to ideas employee might have for development, and refocus on whether or not these ideas are realistic and appropriate based on job description
- Determine if employee has other professional development / career growth ideas

**Step 6: Encourage frequent interaction by the employee throughout the year to clarify expectations and/or to ask questions and seek feedback**

- Use Supplemental Resources as needed:
  - Pre-Review Form
  - Goals Forms
  - Development Plans
  - Conversation Guides
- Check with the employee to determine if a PIQ review is necessary; if so, review and update (see PIQ Cover Sheet Instructions on C&C website)

April 27, 2016