Midyear Performance Review Checklist

Name of Employee: _____   **Date/Time of Meeting** _____ /_____

> *This checklist has been designed to help you with the preparing for the Midyear performance review meeting with the employee. It is broken into three sections Before the Meeting, During the Meeting and Follow-up.*

Before the Meeting

Before you meet with the employee, you need to prepare the following:

- ☐ Book a meeting room if required
- ☐ Send meeting request to employee or confirm meeting
- ☐ Print Unit's Work Plan highlighting any changes that have occurred between the performance planning meeting and the midyear review
- ☐ Print employee's PDQ only if there have been changes otherwise use for review
- ☐ Any goals you would like to suggest for the next performance planning meeting
- ☐ Gather all supporting documentation for your discussion with the employee (notes about performance from your notebook, emails, etc) to provide specific examples of behaviors
- ☐ Enter the rating of the employee and enter specific examples for each goal and competency area supporting your evaluation of the employee. Provide examples, even if the employee excelled so they know what they are doing right. Click here for help.

During the Meeting

During the meeting you need to discuss the following topics with the employee.

- ☐ Take a moment to connect with the employee and identify what is important to them
- ☐ Provide the Unit Work Plan and explain any changes that have occurred since your last review with employee and explain how the employee work contributes
- ☐ Provide the employee with their ratings on each of the competency areas and provide specific examples of how the employee performed for Accountability/Credibility, Job Knowledge/Performance, Communication/Interpersonal Skills, Customer Service and Safety and performance goals
- ☐ Discuss with the employee the need to create one or two Performance goals using the S.M.A.R.T (**S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime bound) goal format.
- ☐ Provide the employee with specific examples, based on your notes, of how they are doing towards their goals
- ☐ Explain to the employee they need to acknowledge and provide feedback on the goals and ratings by 10/17
- ☐ Identify Goal 1:

- ☐ Identify Goal 2 (optional):

Follow-up

After the meeting there are a couple of items you need to complete.

- ☐ Enter the goals for the employee into the system, if you have not already done so. Click here if you need help
- ☐ Follow-up on any of the items you mentioned you would provide to the employee
- ☐ Determine how ongoing communication will occur (team meetings, walk arounds, one-on-ones, targeted performance discussions, etc.)
- ☐ How significant events, accomplishments and milestones will be tracked and documented for the rating period