Checklist for Manager – Employee Performance Review Meeting

Preparation

- **Gather and Review Employee Performance Details**
  - Review the employee’s job description to ensure alignment with responsibilities.
    - If possible, review previous performance reviews in Workday.
    - Assess any changes in responsibility since the employee’s last performance review.
  - Encourage the employee to provide a summary of major projects and tasks, especially those not supervised directly by you.
    - If needed, reach out to other supervisors for feedback on these projects.
  - Review notes, goals, feedback, etc. on employee projects throughout the year.
  - Collect performance data and metrics relevant to the employee’s role.

- **Create Talking Points and Agenda**
  - Draft a meeting agenda highlighting key discussion points.
  - Prepare specific examples of accomplishments and areas needing improvement.
  - Identify any patterns or trends in the employee’s performance.
  - Prepare questions to facilitate an open dialogue and encourage self-assessment.

- **Schedule the Performance Meeting**
  - Schedule a time that allows for an uninterrupted and comprehensive discussion.
  - Provide the employee with advance notice and any materials they need to prepare.

Remember the Objectives of the Meeting

- **Objectives of the Meeting**
  - Review the employee’s performance on their assigned responsibilities.
  - Assess the quality and timeliness of the employee’s accomplishments.
  - Provide feedback on goals and objectives completed (or not completed).

- **Discuss Highlights and Areas for Improvement**
  - Identify and discuss the highlights of the employee’s performance.
  - Reflect on what could have been done differently.
  - Explore how the employee could have been supported to achieve different outcomes.
  - Create actionable goals and objectives for the next performance year.

During the Meeting

- **Create a Positive Environment**
  - Rehearse the conversation if necessary to ensure a constructive tone.
  - Address and help resolve any challenges the employee may have.
  - Hold the meeting in a private and comfortable space.
  - Be an active listener to ensure you are facilitating an open dialogue.
Discuss Accomplishments

- List the goals and objectives of the meeting.
- Ask follow-up questions to gain a fuller picture of the employee’s performance.
- Ensure the employee is meeting University standards.
- Highlight strengths and aspects of the employee’s work with which you are impressed.
- Ask the employee about any undocumented contributions they have made.

Review Completion of Goals

- Be specific in your feedback and use ‘I statements’ to provide personal perspective.
- Discuss challenges the employee faced and provide specific suggestions for improvement.
- Identify areas for improvement, as well as specific methods and objectives for achieving these improvements.
- Discuss which goals were met and how they were met.
- Review goals that were not met and identify challenges/roadblocks that prevented their completion.

Determine Future Goals

- Ensure that future goals are performance-based and within the employee’s control.
- Focus on the employee’s personal and professional growth.
- Present viable career development opportunities (e.g., attending interesting conferences, obtaining certificates in their field, joining a professional organization).
- Clarify immediate action items for both yourself and the employee.
- Address and settle any concerns the employee may have to ensure they feel heard and valued.

After the Meeting

Schedule Regular Check-Ins

- Set up regular meetings to discuss ongoing goals and objectives.
- Provide continuous feedback and support to the employee.

Adjust Goals and Objectives

- Be flexible and adjust goals and objectives as needed based on new information or changing circumstances.
- Ensure that the employee has a clear understanding of their goals and the resources available to achieve them.

Document the Meeting

- Record key points discussed, agreed-upon goals, and any action items.
- Ensure that the documentation is accessible for future reference and follow-up.

Provide Resources and Support

- Offer any additional resources, training, or support the employee may need.
- Follow through on any promises made during the meeting to maintain trust and credibility.