**Performance Discussion Guide**

To help you structure the performance appraisal discussion with your employee, consider following the preparation and agenda suggestions below.

When preparing for the meeting, check that you have:

1. Chosen a convenient and appropriate setting to hold the meeting.
2. Picked a time when both of you can focus on the discussion without interruption.
3. Shared the purpose of the meeting ahead of time with the employee.
4. Determined the agenda we will follow.
5. Forwarded the office phone to voicemail, turned cell phone off and not simply to vibrate, close Outlook to stop e-mail notifications.
6. Made other people aware that you are not to be distracted.
7. Spent enough time planning how you would like the meeting to go.

**Suggested Agenda (45 Minutes)**

### Introduction (2 minutes)

### Staff member view point (10 minutes)

### Supervisor/manager view point (5 minutes)

### Goals and objectives (10 minutes)

### Training and development (5 minutes)

### Feedback from the employee (10 minutes)

### Close on an encouraging note (3 minutes)

* Share email summary of conversation

## Possible performance appraisal discussion format (45 minute timeline)

### **Introduction (2 minutes)**

* Put the employee at ease.
* Set the stage by explaining the purpose is to have a meaningful discussion as well as to plan for the future.
* Review Agenda.

### **Staff member view point (10 minutes)**

* Ask for the employee’s perspective of their performance.
* Ask how the employee views their job and the working climate they perform their job in.
* Ask if the employee has any issues/ problems that they wish to discuss with you.
* Ask if the employee has ideas about how the job could be improved.

**Supervisor/manager view point (5 minutes)**

* Provide a summary of performance.
* Avoid comparison to other staff and focus all comments against the expectation of the job and how they met or didn’t meet the needs of the job.

Note: You may wish to focus on what to **keep** doing, what to **stop** doing, what to **start** doing.

### **Goals and objectives (10 minutes)**

* Ask the staff member to contribute goals and objectives for the coming year.
* Discuss goals that will be motivating and challenging for the employee. (See SMART goals below)
* Collaborate on the goals for the coming year.

### **Training and development (5 minutes)**

* Ask the staff member what training they think they need to take to be able to help them in their job.
* Ask if there are any longer-term career goals that they wish to discuss.

### **Feedback from the employee (10 minutes)**

* Ask if there are any questions, concerns or ideas on how to make the coming year more productive and valuable.
* Let the employee have the last word, even if you don’t agree.

### **Close on an encouraging note (3 minutes)**

* Set the tone for the coming year, be supportive and provide encouragement.

**SMART Goals**

How to set goals – we encourage you to set goals that are **S M A R T**!

**S**pecific: What exactly will be accomplished?

**M**easurable: How will you both know when the goal is reached?

**A**chievable: Is achieving this goal realistic with effort and commitment? Are resources available?

**R**elevant: Why is this goal significant?

**T**imely: When will the goal be achieved?

E.g. Update position manual to reflect changes over past year. Please review each section and update with relevant content that reflects revised processes. Deadline June 1, 2020. We will have regular check ins at our weekly one on one. This will allow coverage in the event of illness or acceptance of other roles. Cross training supports ongoing operations and reduces stress.