

Checklist: Performance Review Meeting

Preparation

- Know the objectives and goals of the meeting.
- Anticipate questions and be as prepared as possible to provide explanations.
- Choose a quiet, private space with as few interruptions as possible.

Conducting the interview

- Create a positive environment and help the employee feel at ease.
- Give balanced feedback, both positive and negative, but start with the positive.
- Focus on the job, not the person.
- Provide examples of both positive and negative behaviors.
- Ask questions and allow the employee to provide feedback.
- When discussing areas for improvement, discuss methods and objectives for improving.
- Discuss possibilities for advancement, the employee's aspirations and professional development necessary to be a candidate for such future positions.

Concluding the meeting

- Summarize and review the important points of the discussion.
- Restate the action steps that have been recommended and provide a time frame for completion.
- Make sure the employee reviews the appraisal and provides written comments.
- Have employee sign the form to acknowledge that he or she has received the appraisal and had the opportunity to discuss the contents. Explain that a signature does not indicate agreement with the content.

Follow-up

- Follow-up with the employee to see how goals and objectives are proceeding within the given time frames.
- Offer the employee assistance in achieving goals and objectives and encourage discussion of successes and obstacles.