EFFECTIVE PERFORMANCE DISCUSSIONS
REVIEWER CHECKLIST

BEFORE

SCHEDULE
☑ Confirm dates/times for all staff discussions
☑ Secure a private, interruption-free location
☑ Allow for 45-60 minutes minimum

COMMUNICATE
☑ Notify individuals two weeks before
☑ Provide date, time and location
☑ Share a brief agenda to clarify expectations
☑ Set a due date for when you need to receive the employee’s draft Goal Agreement and the review form that includes the employee self-assessment
☑ Encourage the employee to prepare by using the Employee Checklist
☑ You may choose to provide the written review in advance to avoid the discussion time being dominated by the employee reading the review

PREPARE
☑ Create an outline
☑ Review last year’s performance review and job description
☑ Finalize your input on the employee’s draft Goal Agreement
☑ Prioritize critical discussion points for each section of the review
☑ Reference specific examples to illustrate points
☑ Talk with your supervisor and/or your HR Client Partner if you anticipate problems or need coaching

DURING

SET THE TONE
☑ Create a positive atmosphere in which open and honest discussion is welcome
☑ Review the purpose of the meeting and ask the employee if other topics should be included

LISTEN
☑ Encourage the employee to participate by asking open ended questions; avoid dominating the conversation
☑ Invite the employee to ask questions, raise issues or concerns and give you feedback
☑ Paraphrase and summarize what you hear

LOOK BACK
☑ 25-35% of discussion should focus on the past
☑ Review overall rating, achievement of goals, and assessment of performance against key factors
☑ Recognize significant accomplishments and contributions

COACH
☑ Provide meaningful recommendations
☑ Phrase feedback constructively

LOOK AHEAD
☑ 65-75% of discussion should focus on the year ahead
☑ Discuss goals and Professional Development Plan
☑ Clearly state expectations for each performance factor
☑ Close by asking for feedback on what you can do differently to support the employee

AFTER

DOCUMENT
☑ Note the employee’s feedback about your performance/support
☑ Track your commitments and follow through on agreements

FOLLOW UP
☑ Establish quarterly or mid-year checkpoints and schedule them immediately after the discussion
☑ Revisit established goals and development areas on a regular basis both formally and informally
☑ Provide timely feedback. Deliver praise and constructive feedback in the moment

ASK
☑ Check in with the employee periodically, ask them to track their goal progress and engage them in taking initiative to seek feedback
☑ Regularly encourage feedback from the employee about how you can provide support

ACT
☑ Recognize and reward successes—big and small (in public or privately, depending on employee preference)
☑ If progress on goals and development areas is slow or off track, revisit, revise or counsel the employee immediately—it’s your job
☑ Seek assistance from your supervisor and/or HR Client Partner if you have performance concerns

The George Washington University, 2013