



Guide for Performance Review and Development for your Direct Reports

Within a few weeks, you will be meeting with your employee to discuss their performance and development plans.

Preparing for the annual performance review is basically a process of collecting information, reviewing all aspects of their performance and making tentative assessments of performance. Tentative assessments must be stressed as no evaluations should be final until after a discussion has taken place between you and your staff member.

Listed below are some suggestions for your consideration when preparing for the meeting. There may be other items you may wish to consider. If so, you may want to record them at the appropriate place on this sheet.

- Share the previous year performance review with your employee and ask them to review the goals, objectives and professional development opportunities they were looking to undertake. Ask them to transfer the previous year goals/objectives and development opportunities to a new form and have them describe what they have achieved. They should provide this to you, for your review and assessment in advance of the performance review meeting order for you to complete the performance review form.
- You may want to ask the employee to prepare an activity report that summarizes their activities over the period of review for your consideration prior to the meeting, or at the meeting.
- Review the major responsibilities noted within the position description
 - Note any additions, deletions and/or changes you feel are appropriate
 - Prepare comments that will support the changes to duties and responsibilities
- In preparation of completing your portion of the performance review, it may be helpful to gather and review information to be used in making an assessment of performance which may include (where applicable):
 - Soliciting any comments (feedback) from other individuals who are in a position to assess the employee's effectiveness;
 - Collecting data from statistics, reports, etc.;
 - Checking the completion of activities; and
 - Reviewing previous reviews of performance (i.e. probationary, trial or annual reviews)
- Review goals/standards for each area of responsibility:
 - Look systematically at all of the expected results (i.e. existing conditions and execution of action which would indicate a responsibility has been performed)
 - Consider effort expended as well as results achieved;
 - Consider two time frames for your assessment - during the year and at this moment (note any changes in performance);
 - Prepare comments on the achievement of objectives
- Review special assignments/projects:
 - Indicate the degree to which the goal/assignment was completed; and
 - Prepare comments on the achievement of results
- Prepare tentative assessments and supporting comments on each of the Performance Factors
- Consider activities for the employee both on-the-job and personally, that will contribute to their development
- When meeting with your employee, consider possible comments or questions they may have;
 - Query the employee about any Workplace Safety and Health concerns or issues they may have;
 - The employee questioning the ratings you have assigned;
 - How will you deal with any difference in perceptions of performance levels?;
 - Is your rating based on measurement that is likely to be understood by the employee?;

Once you have completed your personal draft of the information to be discussed, plan for the performance review meeting

Points to Consider:

- Schedule a specific time and place for the meeting.
- Develop an interview agenda including opening remarks, sequencing of items, asking questions, summarizing the action to be taken, provision of a copy of the final assessment, etc.
- Notify them of the meeting and the topics to be discussed