

## **Performance Review and Plan Document**

### *Considerations for Managers/Reviewers*

#### **Before the meeting...**

- Ensure ongoing dialogue takes place throughout the performance management cycle to ensure there are no surprises for the employee during the meeting. Take time to understand why performance is successful, or why it may need development, including feedback from others if appropriate. Document and address these items as they come up so you are able to back up feedback using specific examples.
- Inform the employee about the upcoming performance development meeting well in advance; ensure a minimum of one hour of uninterrupted time is booked for the meeting.
- Review their last performance management documents, including goals and objectives.
- Give the employee the self assessment document to complete two weeks before the review date and have them return it to you one week prior to the review date.
- Ensure a current job description is available and give a copy of it to the employee with the self-assessment. Give the employee a copy of the department vision/mission statement (where available).
- If there are significant concerns with regards to performance, please ensure you contact your HR Advisor prior to holding the review meeting.**

#### **During the meeting...**

- Reserve a quiet (no interruptions), private space and ensure the employee feels comfortable.
- Ensure you take time to incorporate the employee's remarks into the conversation in order to facilitate open discussion from both points of view during the review meeting.
- Go through the document with the employee using it as a conversation guide to ensure feedback is given in the numerous competency areas.
- Discuss completion of goals, achievements, incomplete goals from the past review period, roadblocks that may exist, future development opportunities etc.
- Set new measurable goals and objectives for the upcoming year. Ensure goals are agreed upon and expectations are understood.

#### **Some tips for providing constructive feedback to employees...**

- Focus on specific rather than general work behaviours – general statements can be vague and provide little useful information, especially if you are attempting to correct a problem.
- Keep comments impersonal and job related
- Support the feedback with examples – it helps the employee to identify specific behaviours.
- Let the employee speak – they may have valuable insight into the challenges they face. You should also be open to feedback, as you may have to adjust your management style to support the employee.
- Ensure the employee has a clear and full understanding of the feedback.
- Detail a future plan of action that the employee is responsible for and ensure they understand what improvement (if any) is needed.

#### **After the meeting...**

- Review the document, adding any additional comments from the meeting and give the employee a copy. Ensure the employee is given a copy of the optional comment sheet for completion if desired.
- Place a copy of the signed performance review and plan document in the department employee file.
- Discuss a time for the next development meeting.
- Follow up regularly, checking in on completion and progression of goals and keep your word around items discussed in the review (such as training for the employee).