



Within a few weeks, you will be meeting with an employee to discuss his/her performance and development plans.

Preparing for the annual performance review is basically a process of collecting information, reviewing all aspects of the employee's 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 the employee.

Listed below are some suggestions for your consideration when preparing for the interview. 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.

- Ask the employee to assess her/his performance over the review period as well and draw up a draft of the form to be compared with your version of the form. A final compilation can then be prepared, incorporating as many of the employee's and your points of consideration as possible.
- You may want to ask the employee to prepare an activity report that summarizes his/her activities over the period of review for your consideration prior to the meeting, or at the meeting.
- Review the major responsibilities of the position
 - Note any additions, deletions and/or changes you feel are appropriate
 - Prepare comments that will support the changes to duties and responsibilities
- Become familiar with the information to be provided in the Performance Review and Development Plan
- Gather and review information to be used in making an assessment of performance which may include:
 - 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 his/her development
- Consider possible comments or questions the employee may have;
 - Query the employee about any Workplace Safety and Health concerns or issues he/she may have;
 - The employee's rating of objectives and performance factors;
 - Is the employee's rating likely to be substantially different than yours?;
 - 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 interview with the employee.

Points to Consider:

- Schedule a specific time and place for the interview
- 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 the employee of the interview and the topics that will be discussed