

Labor and Employee Relations Division

PERFORMANCE DISCUSSION CHECKLIST

Continuous dialogue and feedback is essential to an effective performance management system. The Performance Management and Appraisal Program requires that employees and managers/supervisors document, and discuss performance as it relates to organizational goals and priorities in the performance discussion. During these discussions, employees and managers/supervisors discuss the employee input (if written), accomplishments to date, any issues impeding progress, and developmental needs. This conversation is also a good time to review job elements to determine if adjustments are needed. Before the performance discussion, apply this checklist to make sure you are fully prepared.

Employee	Manager/Supervisor
<input type="checkbox"/> Review your performance plan to ensure that it reflects your current work focus.	<input type="checkbox"/> Review the employee's performance plan and work priorities, noting your employee's performance thus far as compared to the established standards.
<input type="checkbox"/> Review your notes on your performance.	<input type="checkbox"/> Review organization's goals and priorities and note any changes that may affect the employee's performance plan.
<input type="checkbox"/> Consider your performance thus far as compared to your performance elements and standards.	<input type="checkbox"/> Review your notes on the employee's performance to date.
<input type="checkbox"/> Be prepared to provide examples of your contributions, focusing on the following: <ul style="list-style-type: none"> • Tasks you have completed • Problems you have solved • Progress on your developmental interests 	<input type="checkbox"/> Note specific tasks the employee has completed or that still require completion and any problems your employee has solved or that need to be solved.
<input type="checkbox"/> Prepare questions you may have related to the following: <ul style="list-style-type: none"> • Problems with which you need help • Tasks that have yet to be completed • Developmental, training, and learning needs or interests. 	<input type="checkbox"/> Consider where the employee is performing well and where they may need support or training.
<input type="checkbox"/> Note where your manager/supervisor can help you remove obstacles and overcome challenges. If necessary, be prepared to suggest adjustments to your performance plan to reflect new work or changed goals and priorities.	<input type="checkbox"/> Create an agenda for the performance discussion and plan your feedback.
<input type="checkbox"/> Remember to keep the conversation focused on the progress to date. It is not the time to speculate or discuss possible ratings.	<input type="checkbox"/> Remember to keep the conversation focused on progress to date. It is not the time to speculate about or discuss possible ratings.
<input type="checkbox"/> Complete the performance discussion.	<input type="checkbox"/> Complete the performance discussion