## Guide for Conducting Performance Discussions

### Overall goals for the discussion:
- Build rapport and continue to establish the relationship with employee
- Gather information and feedback
- Address any issues that need resolving

### OPEN the discussion

Connect personally with the employee
- Acknowledge employee
- Explain purpose of meeting
- Ask open-ended questions, e.g., “How are things going?”
- Listen for employee perceptions

### REVIEW position description

- If new employee, review any expectations discussed during interview or within first few weeks of employment
- Determine whether employee expectations are consistent with position description – changes, miscommunications?
- Is employee operating within position description parameters – employee involvement in committees appropriate, overly burdensome?
- What does the employee like about the job? What do they like about it? Why? Can this type of work be expanded?
- Is there anything the employee does not like about the job? If so, why? Can it be changed or is it a business necessity of the job? Discuss ways the employee can approach doing aspects of the job they don’t like.

### REVIEW goals

- Determine with employee whether goals are relevant or whether organizational needs have changed
- Review timeframes and expectations of work product/outcome.
- Discuss with employee your expectations for comprehensive completion of assignments. What does it look like? Provide samples? Explain what each of the ratings would look like, provide concrete examples; and discuss what would not meet expectations.

### REVIEW competencies

- Review the description of the selected competencies. The description is not a checklist, but rather, a description of how the competency is demonstrated appropriately.
- Determine whether there are concerns with the employee “over demonstrating” or “under demonstrating” any particular competency. Remind the employee that “over” or “under” demonstrating indicates a need to adjust behaviors and is not a personal indictment.

### REVIEW key work partners

- Are there any concerns regarding key work partners?
- Is there any particular key work partner who has been especially helpful? Discuss possible recognition.

### REVIEW training and development

- Are training and development needs the same or have they changed?
- Are the training and development actions listed achievable?
- Are there budget and/or time constraints that are barriers to training and development? If so, discuss any ways these barriers can be overcome.

### REVIEW supervisory support

Prior to the meeting, consider whether you are meeting your end of the performance management process. Are...
you doing what you said you would do? This section could be uncomfortable for the employee. It’s important that you express genuine concern for helping the employee achieve their goals. Remember, an employee who achieves their goals helps you achieve yours.

- Discuss the employee’s expectations and concerns

**CLOSE the meeting**

- Thank the employee for their efforts
- Repeat any changes or action items that have surfaced
- Thank the employee for their efforts again