**Performance Discussion/Meeting**

**Worksheet**

The purpose of this discussion worksheet is to prepare managers and staff with a resource to facilitate better, more effective communication related to work performance and organizational effectiveness. Performance discussions are useful in order to foster frequent, constructive dialogue that builds trust, improves communication, provides accountability, and promotes a greater sense of connection to the organization. These items are intended to establish a model of communication between the manager and employee. However, managers and staff still have to use judgment in determining which of these items and/or what other questions are applicable or appropriate to use in a particular situation.

***When should you have a performance discussion?*** Performance discussions can occur during the formal annual review process; however, more frequent feedback is encouraged. You can also provide feedback in other settings, such as regular one-on-one meetings with managers and staff, quarterly check-ins with staff, peer feedback, group debriefs, evaluations, and after completion of a project.

***Instructions:*** Prepare a script prior to the meeting by reviewing and completing items “1 – 8”. Items “9 – 14” are for your use to take notes during the meeting. This worksheet is only to be placed in the departmental employee file and not the employee HR file. It is recommended that you use the **Performance Meeting Guidelines** formas a support tool for this worksheet. The examples provided below are for reference only and you should prepare your own script depending on your specific needs.

*Discussion between* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_\_\_\_\_\_\_\_\_\_.

Employee Name Supervisor Name Date

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| 1. Performance Discussions should be prepared whether the feedback is positive or corrective |
| Questions to consider before the discussion:  *Positive Feedback:*   * Does the employee need additional tools/resources to continue positive performance? * Is the employee receiving efficient feedback and direction from you, the supervisor? * Is the employee content with the work environment and team atmosphere? * What plans could be put in place to assist the employee in achieving more from their role?   *Corrective Feedback*:   * Did the employee clearly understand the rule, policy, or job expectation that was violated? * Did the employee know in advance that such activity would be subject to corrective action? * Was the rule violated reasonably related to the safe, efficient and orderly operation of the business? * Is there substantial evidence that the employee actually did meet the expectation? * Is the action planned reasonably related to the seriousness of the offense, the employee’s record with the organization, and consistent with actions given to other employees who have committed a similar offense? |
| 1. Consult and research to obtain feedback. interview team members and/or customers, ask for written statements, clarify inconsistencies, consult with management and Human Resources, and ask for specifics *Note: communicate it is a sensitive and private matter but do not promise confidentiality* |
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| 1. Performance that is to be reinforced to continue positive performance   “OR” Performance that must be corrected. Give examples. |
| *Positive*: “Joe, I want to commend you on your valued performance. Specifically, I have observed (be specific, provide examples)…”  *Corrective*: “Joe, there is something that is concerning me which is (be specific, provide examples, provide dates). I need to talk to you about it.” |
| 1. Dates of any previous performance meetings and any outcome |
| *Positive*: “We discussed your expectations last month, and you continue to perform above a satisfactory level. Specifically I would like you to continue to……”  *Corrective*: “I talked to you about this during your last performance evaluation on (provide dates).” “I clarified these performance expectations with you last month.” “The performance expectations were (be specific, use previous notes to give examples, encourage them to take notes)” |
| 1. Restate Job expectation |
| *Positive:* “You are performing well. Continue your strong performance by (be specific, provide examples)…”  *Corrective:* “As you know, you are expected to (clarify the job expectations even though they have been provided to them in the past, provide dates when you previously discussed the job expectations)…” |
| 1. Facts of actual performance   (If facts are in dispute, you may need to postpone the meeting for further  investigation.) |
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| 1. Business impact (What is the impact to employees, customers, the mission of the organization, etc.?) |
| *Positive*: “By exceeding your expectations, you ensure that the customers’ needs are met.”  *Corrective*: “When you are late to work, students cannot get into the building.” |
| 1. If positive, then plan a reward or recognition   (such as note of commendation, recognition in staff meeting, recommendation for staff award) |
| □ Monitoring/Feedback □ Coaching Session |
| 1. If corrective, then plan consequences/resources   (such as corrective action, no merit increase, more training, etc.) |
| □ Counseling Session □ Level 1 Reminder □ Level 2 Reminder □ Level 3 Reminder |
| 1. Employee’s response (Document any employee request for additional training/resources, admission, denial, or extenuating circumstances.) |
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| 1. Employee’s solution (Discuss employee’s solutions and any other stated actions needed to continue strong performance/resolve the problem.) |
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| 1. Employee’s agreement to meet expectation   (Note: statements such as: “I agree to do…” or “I will do…” but “I’ll try.” is not sufficient.) |
| *Positive*: “I’m glad we were able to speak about your strong performance, and I’m confident in your ability to continue to exceed expectations.”  *Corrective:* “I’m glad we were able to address this problem, Joe, and I’m confident you’ll do it.” |
| 1. If Corrective, level of any corrective action taken |
| □ Counseling □ Level 1 Reminder □ Level 2 Reminder □ Level 3 Reminder |
| 1. Potential consequences of continued behavior/performance |
| *Positive*: “If your strong performance continues, we will have the opportunity to talk about leadership/development/advancement opportunities…”  *Corrective*: “While I’m sure you’ll correct this, in fairness to you, if there are any further problems it could lead to…” |