

### **Guidelines for the Mid-Year Performance Discussion**

#### *Step One: Schedule the Mid-Year Check-in.*

- At least one week prior to the date. Supervisor should notify the staff member of the meeting.
- Explain the purpose of the mid-year check-in is to review performance expectations and/or job responsibilities, talk about how things have been going, and identify steps that can be taken to facilitate performance.

#### *Step Two: Prepare for the Mid-Year Check-in.*

- Review employee's goals and/job responsibilities.
- Examine notes or other information on performance. Reach out to customers if needed.
- Make a preliminary determination of the extent to which progress or performance is achieving expectations.
- Consider whether changes need to be made to goals.

#### *Step Three: Conduct the Mid-Year Performance Discussion*

- Confirm staff member's understanding of the purpose of the mid-year check-in.
- As the staff member for verbal self-assessment of progress on achieving goals. Supervisor should add his/her perspective, sharing observations.
- Reinforce favorable performance and accomplishments.
- Discuss cause and solutions to performance issues/problems. Supervisor should ask how s/he can help staff member succeed.
- Discuss whether changes should be made to goals and/or performance.
- Summarize about: progress; favorable results; performance issues; solutions; agreements and commitments
- Remind staff member to access the PMDP system and electronically acknowledge the mid-year check-in has been completed and submit to HR.

#### *Step Four: Follow Up*

- Follow up on action plans
- Schedule follow up discussions as appropriate