



Typical Tasks in Preparation for the Performance Appraisal Meeting

Employee Tasks	Manager Tasks
<p>Recommended Practices:</p> <ul style="list-style-type: none"> • Expect to receive an appointment to meet with your manager • Gather appropriate documentation and resources needed for the meeting 	<p>Recommended Practices:</p> <ul style="list-style-type: none"> • Provide minimum 15 days' notice • Verify mutually convenient location and time • Ensure the location is private • Advise employee what documentation and resources to bring to the meeting
<p>Review and understand job responsibilities</p> <p>Recommended Practices:</p> <ul style="list-style-type: none"> • Learn about department goals and strategic corporate objectives • Understand the knowledge required for you • to achieve objectives (Technical Skills) • Understand the attitudes and skills expected of you in your role (Essential or "soft" skills) 	<p>Clarify job responsibilities</p> <p>Recommended Practices:</p> <ul style="list-style-type: none"> • Establish links between individual and department goals with strategic corporate objectives • Define the knowledge required to achieve objectives (Technical Skills) • Identify the attitudes and skills expected of the role (Essential or "soft" skills)
<p>Recommended Practices:</p> <p>Consider performance using quantitative and qualitative criteria for technical and "soft" skills such as:</p> <ul style="list-style-type: none"> • Project Reports • Status Reports • Statistics • Feedback from Clients, peers and business partners, manager • Emails, letters, documentation • Completion of development requirements 	<p>Recommended Practices:</p> <p>Consider performance using quantitative and qualitative criteria for technical and "soft" skills such as:</p> <ul style="list-style-type: none"> • Project Reports • Status Reports • Statistics • Feedback from Client, Peers and other business partners, manager • Emails, letters, documentation • Observation reports • Status of development requirements



Typical Tasks in Preparation for the Performance Appraisal Meeting

Employee Tasks	Manager Tasks
Review overall expectations and performance criteria	Jointly discuss overall expectations and performance criteria
Review each objective in detail Recommended Practices: Focus on performance based on objectives and set criteria	Review each objective in detail Recommended Practices: Focus on performance based on objectives and set criteria
Decide what additional information is needed	Decide what additional information is needed
Document interim meeting date(s)	Determine interim meeting date(s)
Participate in joint discussions and on-going feedback and coaching	Schedule regular coaching and one-one meetings with employee
Regularly review areas for development Discuss what additional support is required to achieve success; develop an action plan and what employees will do to ensure success.	Regularly review areas for development Identify additional support is required to achieve success; develop action plan and what manager will do to help employee achieve success.
Document Progress	Document Progress