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## SUPERVISORS GUIDE TO PERFORMANCE DISCUSSIONS

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Holding successful performance reviews and final performance appraisal discussions requires preparation. For example, developing a comprehensive written performance narrative can be extremely helpful when preparing for the face-to-face performance discussion. Rating Officials can use the following checklist as a tool to help them prepare for an employee performance discussion

### Gather the Material

Have all the necessary tools close at hand before beginning the appraisal narrative, including:

- a copy of the employee's performance plan;
- notes of previous meetings with the employee (remember what was discussed with the employee during previous meetings);
- employee input documents, which could include a list of completed projects and accomplishments prepared by the employee;
- written or recorded feedback on employee performance from other sources (these can include letters of appreciation, customer feedback, etc.);
- Performance Management program instructions that describe the performance plan process and procedures.

### Review and Write

Familiar with DoD Civilian Performance Plan, Progress Review and Appraisal, DD Form 2906. Review how to derive the summary rating (e.g., numerical formula, percentages, and numerical weights). Take the time to review the employee's elements and standards and how to measure employee performance. Finally, review all the documentation. When writing the narrative, consider three points:

**Responsibilities and Duties.** Review employee responsibilities:

- Have the employee's work responsibilities changed? If so, how?
- Has the employee been assigned additional responsibilities which were not included in the performance plan? If so, consider acknowledging these additional responsibilities in the narrative and the performance discussion.
- Also, consider whether to include the new responsibilities in next year's performance plan.

**Performance.** Include performance data for the entire performance period, not just the most recent information. The appraisal narrative should address:

- how well the employee performed the assigned responsibilities and the quality and/or;
- timeliness of the employee's accomplishments;
- whether and how well the employee met performance elements;
- areas of performance that improved over the performance period; and
- areas of performance that might need improvement.

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**Review Developmental Needs.** Review notes, previous appraisals, and employee input to identify areas of development.

- In addition to the information in the narrative, prepare to talk to the employee about developmental needs. Identify skills and competencies that may enhance or improve the employee's performance. Look into a variety of ways of improving skills, such as classroom or on-line training, professional conferences and workshops, details to other work units or to positions with higher responsibilities, or on-the-job training. Enter the performance discussion with this information on hand, but during the performance discussion, be sure to ask the employee for input on development needs. If employees participate in creating their own development plans, those plans likely will be more successful.

### Schedule the Discussion

The final preparation step is to set aside a time and a place to meet with the employee. When scheduling the performance discussion, make sure to:

- Schedule a time that is convenient for you and the employee. This should be uninterrupted time so that you and the employee can concentrate on the appraisal.
- Give the employee a copy of the performance plan with its narrative before the meeting so that he or she can have time to prepare for the performance discussion.
- Be sure to check with your leadership on whether you need to have higher level review of your ratings before communicating a final rating or award information to the employee.

When the supervisor takes time to prepare, conducting the performance discussion can be less complicated, less stressful, and more successful in providing the employee valuable feedback on their performance.