Annual Performance Evaluation
Discussion Guide for Managers & Supervisors

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Support

What resources do you need?

What tools can I provide?

How can I help you succeed?

How can I facilitate your development?

I'm interested in your professional growth.

Supporting employees builds trust and communicates that the organization wants to ensure their success.

Recognition is a communication tool that reinforces the most important results employees achieve for your agency.

Coach

Let me give you some guidance on demonstrating our values.

I'd like to expand your understanding of our performance measures.

What questions or concerns do you have on your performance goals?

How can I clarify your peformance goals further?

I have some suggestions for you.

Recognize

You've contributed to our team success in these specific ways.

You've demonstrated our core values in these specific ways.

You have done these things well.

Here are some things that could be done even better.

In your work with others, here are some things I've documented.

I value your work in these ways.

Involve

What were the highlights of your work this year?

What were the challenges and/or barriers you faced?

What documentation would you like to share?

What are your suggestions going forward?

How do you see yourself developing further?

Coaching increases the probability of an employee's success through timely feedback and guidance.

Involving employees in the performance conversation is critical to engagement and motivation.

Plan the Meeting

- Schedule the meeting as early as possible, in case follow up is necessary.
- Inform your employee well ahead of time, so he/she can be fully prepared.
- Reserve a location where you will not be disturbed by email, phone, or other interruption.
- Schedule sufficient time to conduct a thorough and productive conversation—30-60 minutes is recommended.

Prepare for the Meeting

- Decide on the goal(s) you want to achieve in this conversation.
- Remind the employee to complete his/her self-evaluation.
- Review the employee's self-evaluation thoroughly.
- Gather relevant documentation to share as the basis of your evaluation.
- Ask yourself some key questions as you map out the discussion.
  - What is important to this employee?
  - What approaches have worked in the past?
  - What does an ideal outcome look like?
  - What do I think is a fair and calibrated rating for this employee's work?
  - What opportunities will open after this meeting?
  - If performance is not meeting expectations, how will I address this?
  - What responses do I anticipate from the employee on each of the points?

Conduct the Meeting

T

- Tell the employee what you will be talking over, and why it is important.
- Give a well-prepared opening to set a productive tone for the meeting.

A

- Address data, facts, and rationale (both yours and the employee's).
- Clearly explain the basis for each of the ratings you assign.
- Allow time to process any issues.
- Assess materials provided by both you and the employee.

L

- Listen for your employee's ideas and suggestions.
- Make this a true dialogue.
- Ask open-ended questions, and listen actively to the answers.

K

- Keep the conversation focused and positive.
- Check for understanding.
- Agree on roles and actions.
- Plan follow up if necessary.

Reflect on the Meeting

- Enter any conversation notes and documentation in the NCVIP Performance Management System.
- Sign off and submit the Annual Performance Evaluation in the NCVIP Performance Management System.
- Check your system action items to verify submission.
- Send any follow up messages to confirm main points and action items.
- Create a management file in which you note:
  - Where you felt well-prepared
  - Where you could have been more prepared
  - Things that surprised you
  - Aspects that were challenging
  - Things that went well and why
  - What you would do differently next time
- Schedule any planned follow up meetings.
- Deliver any promised action items.