



Pre-Evaluation Meeting

The pre-evaluation meeting is a critical step that helps align the supervisor and employee, builds trust, and establishes solid communications. The pre-evaluation meeting gives the supervisor the opportunity to sit down with the employee and get their perspective on the information that was gathered during the preparation stage. This step helps the employee get a better feeling about the performance evaluation and relieves the inherent fear associated with a performance evaluation.

Schedule the Meeting

None of us like to be surprised when it comes to discussing our performance. In fact, scheduling your pre-evaluation meeting tells the employee that you're serious about having an open, productive meeting and giving them a fair evaluation.

- Let employee know what the meeting is about.
- Schedule enough time to:
 - Review all material with employee
 - Allow time for productive discussion
- Give employee at least a day or two to:
 - Gather their documentation
 - Review their notes
 - Plan what they want to discuss

Plan What You Are Going to Say

Performance discussions are very important to employees. It's important to plan what you want to discuss and what you want to say when you meet with your employee.

- Write down what you want to accomplish in the meeting.
- Focus on performance, not the person.
- Key points to discuss:
 - Employee performance file
 - Accomplishments
 - Progress since last evaluation
 - Customer feedback
 - Expectations
 - Changes that impacted performance
 - Goals and objectives for next year
 - Feedback from the self-assessment

Conducting the Pre-Evaluation Meeting

Here are some tips when conducting the actual meeting.

- Choose a quiet, private location with as few interruptions as possible.
- Start with a positive point. It's very important to start your meeting on the *Human* side; a simple compliment, inquiry about the employee or family, or a brief conversation about a



hobby or interest that the employee has. This helps to break the ice and put the employee at ease. It also shows the employee that you're interested in them as a person.

- Explain the overall evaluation process and timelines to the employee.
 - How the overall evaluation process works
 - Evaluation by supervisor
 - Approval by next level supervisor
 - Meeting with employee following approval
 - Send or give employee completed evaluation for comments and signature
 - What happens next
 - When you will begin evaluating employees
 - When you plan to schedule a meeting with the employee to review the evaluation
- Discuss the employee self assessment and information gained during the preparation with the employee.
 - Discuss any discrepancies in how the employee sees their job expectations or how their job fits into the department function
 - Strengths and weaknesses
 - Support, funding, priority changes, and organization changes that impacted performance
 - Employee job performance and career advancement goals
- Close the meeting on a positive note.
 - Thank the employee for their input and time
 - Close on the human side