

Mid-Year Performance Discussion Guide

Schedule a meeting

- Ask your employees to come prepared to discuss progress towards goals established, major accomplishments achieved so far, and their priorities for the rest of the year.

Prepare for the discussion

- Review the goals you established for your employees at the beginning of the year.
- Assess progress toward goals and what has been accomplished to date.
- Consider if there are potential obstacles and what support might be needed.
- Determine if any goals or priorities might need to be adjusted or changed.

Meet and discuss performance to date

- First, check in on the employee's overall wellbeing (work-life balance, stress, teamwork, and sense of belonging, etc.)
- Ask questions such as:
 - What's going well?
 - What could be going better?
 - Are you experiencing any problems or challenges?
 - Do you need any additional resources or support?
- Use their feedback as the foundation for a discussion about how you view their progress toward the goals you established at the beginning of the year.
- Provide specific examples of what the employee is doing particularly well – both in terms of what has been accomplished and how it has been accomplished.
- Provide specific examples of where the employee may need to improve – both in terms of what needs to be done and how it should be done.

Discuss expectations (yours and the employee's) about what should be accomplished by the end of the year.

- Find out what challenges or roadblocks are faced by the employee. Ask how you can help eliminate roadblocks, and then follow through.
- Discuss if any of the goals should be adjusted or changed.
- Agree on how goals should be prioritized for the remainder of the fiscal year.
- Ensure a shared understanding of performance expectations to minimize unpleasant surprises at the year-end performance review.

Complete the discussion

- Thank the employee for their hard work and encourage them in their work for the remainder of the year.
- Document the discussion and provide a copy to the employee.

Mid-Year Performance Discussion Template

What's going well? (Goals, Projects, Professional Development, etc.)
Are you experiencing any problems or challenges?
What could be going better? (Performance, Roadblocks, Resources, etc.)
Any adjustments or changes (Goals, Priorities, Resources, etc.)

Employee _____

Date _____