December of each year marks the beginning of the second-half of the performance year—which means it is time for Mid-Year Performance Reviews. The mid-year review consists of:

I. The mid-year progress discussion;
II. Documentation of performance to date; and
III. Feedback

I. Mid-Year Progress Discussion
This is a formal meeting between supervisor and employee to discuss the employee’s performance and development progress to date.

<table>
<thead>
<tr>
<th>SUPERVISOR’S ROLE</th>
<th>EMPLOYEE’S ROLE</th>
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</thead>
<tbody>
<tr>
<td>a) Provide feedback to the employee on performance to date</td>
<td>a) Provide information to the supervisor on accomplishments and/or obstacles that may be preventing her/him from meeting performance expectations</td>
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<tr>
<td>b) Identify performance deficiencies that need to be addressed</td>
<td>b) Ask for feedback on progress to date</td>
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<tr>
<td>c) Address adjustments that need to be made to the performance and development plan</td>
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How to Prepare for and Conduct a Mid-Year Progress Discussion

SUPERVISOR

Step 1: Gather the employee’s performance plan, along with your observations, notes, documentation, and any other materials regarding the employee’s performance to date.

Step 2: Compare the employee’s actual performance and development progress to the performance and development expectations documented in the annual performance evaluation.

Step 3: Meet with the employee, clearly stating the purpose of the meeting.

Step 4: During the meeting, use appropriate examples to ensure the employee understands what you are trying to communicate to her/him.

Step 5: Allow the employee an opportunity to state any concerns or provide responses to your observations of his or her progress to date.

Step 6: Agree on any adjustments that need to be made to the performance and development plan. If the employee’s performance rating for the period to date is below a 2.5, complete a Performance Improvement Plan (PIP). A PIP must be completed if the employee’s performance rating for the period to date is below a 1.5.

Step 7: After the meeting write a summary of the discussion by completing the Mid-Year Performance Review Form.
EMPLOYEE

Step 1: Gather information on accomplishments to date and any obstacles preventing the employee from meeting performance expectations.

Step 2: Compare actual performance to the performance expectations and development progress towards development plans.

Step 3: Meet with the employee’s supervisor to discuss performance progress. Be sure to ask the supervisor for performance-related feedback and discuss any adjustments that should be made to the performance and development plan.

II. Documentation of Performance to Date
The purpose of documentation is to keep a running log of employee performance. It is both the supervisor and employee’s responsibility to collect and maintain information on the employee’s performance throughout the performance management period.

Documentation may include:
- Concrete and tangible work examples.
- Documentation on meetings regarding employee performance.
- Copies of compliments or complaints from customers.
- Copies of disciplinary action documents or related materials.
- Data on the results of the employee’s performance in the form of statistics or performance measures.

INSTANCES IN WHICH DOCUMENTATION IS HIGHLY RECOMMENDED

- A supervisor begins to observe a pattern of performance that results in the employee’s inability to satisfactorily meet her/his performance expectations.
- An employee receives recognition for his/her performance from a customer (internal or external).
- An employee receives feedback on poor performance or performance that needs improvement.

III. Feedback
This is a process that promotes frank, two-way communication between employees and supervisors about the employee’s performance. It is used to provide guidance on how to improve performance and recognize satisfactory and above satisfactory performance.

Types of Feedback: Supportive and Developmental

WHEN TO USE SUPPORTIVE AND DEVELOPMENTAL FEEDBACK

<table>
<thead>
<tr>
<th>It is best to use supportive feedback when:</th>
<th>It is best to use developmental feedback when:</th>
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<tbody>
<tr>
<td>① The employee is meeting or exceeding a performance expectation;</td>
<td>① The employee is not meeting a performance expectation;</td>
</tr>
<tr>
<td>② The employee is putting forward his or her best effort; or</td>
<td>② The employee’s efforts are inconsistent; or</td>
</tr>
<tr>
<td>③ The employee is trying hard, despite difficult circumstances.</td>
<td>③ The employee does not solve problems well in challenging situations.</td>
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