



Performance Management Mid-Year Check In Checklist

Use this checklist to prepare for the facilitation of an effective Mid-Year Check In Meeting.

BEFORE THE MEETING

- Review individual performance goals and achievements.
- Familiarize yourself with each staff member's job-related responsibilities.
- Prepare talking points about performance including achievements, areas of opportunity and next steps.

DURING THE MEETING

- Set a Positive Tone:**
 - Begin the meeting on a positive note, expressing appreciation for their time.
- Goal Review and Adjustment:**
 - Review goals that were set as a part of the SMART goal process making adjustments, if necessary, based on changing priorities or circumstances.
 - Offer specific, constructive feedback on performance, discuss challenges and collaborate on finding solutions. Be sure to offer support as needed.
 - Acknowledge and celebrate achievements highlighting improvements and contributions.
- Encourage Self-Reflection and Open Communication**
 - Allow employees time to reflect on performance and share their perspective.
 - Ensure you create an atmosphere where employees feel comfortable sharing concerns by actively listening and staying engaged during the conversation.
- At the End of the Meeting:**
 - Summarize meeting outcomes and next steps
 - Positively wrap up the meeting by highlighting successes and recognizing the employee's contributions.
 - If time allows, discuss career goals and aspirations. If time does not allow, we encourage you to include this topic in future conversations with employees to support their professional goals and ongoing development.

AFTER THE MEETING

- Take Note of the Discussion:**
 - Keep detailed notes on the discussion for future reference as you continue to check-in on progress.
- Follow Up:**
 - Include goal check-in as a part of the routine employee 1:1 meeting.
 - Schedule a follow-up meeting as appropriate.
 - Offer ongoing support and guidance as needed.

PERFORMANCE MANAGEMENT RESOURCES

Employee Development

- [Developing an Individual Development Plan](#)

Leadership Development

- [Strategies for Employee Growth and Development](#)
- [Delivering Constructive Feedback](#)
- [Leadership Development](#)

Contacts

- [HR Business Partners](#)
- [Talent Management](#) (system and training support)

Helpful Resources

- [Performance Management Website](#)
- Mid-Year Check In [Employee](#) and [Manager](#) Guides

The Mid-Year Check In meeting is an opportunity to build a positive professional relationship with employees while creating alignment in the work and providing feedback that supports employee ongoing growth and success.