The **Performance Review and Discussion Preparation Tool** is intended to help you prepare for a meaningful performance discussion. Please document past performance highlights and identify areas for current and/or future professional development and career growth.

**Instructions:**
- Complete Sections I and II
- Section III – Discussion Questions for Consideration
- Section IV – Proposed Performance/Development Goals
  - Indicate desired developmental needs/goals
  - Recommend an action plan (e.g., training, special projects, professional conference, seminar, committee participation, etc.)
  - Establish a potential target date for accomplishing the goals
  - Individualized/customized training may be identified in consultation with Human Resources.

### Section I – Job Responsibilities

Have your job duties and/or responsibilities changed during the review period? If so, list the primary changes below.

### Section II – Accomplishments and Achievement of Goals

List major goals and major accomplishments achieved in the past year. If multi-year goals apply, indicate milestones reached. If no goals were set, please indicate contributions made in the year (e.g., projects; mentoring or training staff; enhanced service delivery; demonstration of leadership; mastery of skill or knowledge base; team/unit support; committee participation, etc.).
Section III – Discussion Questions for Consideration

Consider the following questions as you prepare for the meeting with your supervisor.

- Are there any specific aspects of your job you would like to discuss during your performance review?

- During the past year, what aspects of your job gave you the greatest satisfaction? What have you found challenging?

- What training did you participate in this year? In what ways was it helpful?

- What new skills would you like to learn to help you in your work or to prepare for additional responsibilities?

- Is there anything your supervisor can do differently to help you succeed?

- What would help you to work more collaboratively in your work environment? Please be specific.

- In what areas would you hope to improve your performance during the coming year? What would help to enhance your job performance?

- What goals and objectives do you wish to achieve in the coming year?

Section IV – Proposed Performance/Development Goals

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<th>Performance/Development Goal</th>
<th>Action Plan</th>
<th>Target Date or Milestone</th>
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