

INSTRUCTIONS FOR COMPLETING PROGRESS DISCUSSION FORM

Progress discussions should be conducted twice a year before completing a performance appraisal. Depending when the yearly performance appraisal is due, the progress discussions should be conducted every four months. For example, if the performance appraisal was given in December, then the first progress discussion would be held in April and the second would be held in August. This is to ensure that employees will have a clear understanding of their progress throughout the year.

The Progress Discussion Form can be completed prior to having the progress discussion with the employee or after you meet with him/her. Often times, the supervisor may not have enough information to complete the "Progress Made Towards Goals" section before he/she meets with the employee.

1. Fill in the information at the top of the form.
2. Refer to a copy of the most recent annual performance appraisal form you used to rate the employee's performance.
3. Complete the section entitled "Adherence to Policies and Procedures". This section should include information regarding the employee's time, attendance, adherence to safety standards and ability to follow other policies and procedures.
4. Complete the section entitled "Strengths/ Accomplishments"; try to write in at least two items.
5. Complete the section entitled "Progress Made Towards Goals"; refer to the annual performance appraisal's goals area of their last performance evaluation. Write in what progress the employee has made in reaching those goals.
6. Complete the section entitled "Activities To Develop/Improve in Daily Work Activities and/or To Meet Goals". Write in what areas the employee needs to work on and what goals the employee should accomplish.
7. Sign and date the form; give it to the employee for his/her signature; give a copy of the signed form to the employee and keep a copy for your records.
8. If a performance plan is in place, it is recommended that you use more than this Progress Discussion Form. You should prepare documentation that addresses the progress that has been made towards meeting the goals set out in the performance plan.
9. If an employee's progress is declining so much that they could potentially receive a "Unsatisfactory" on their annual appraisal, it is recommended that a performance plan be developed in lieu of a progress discussion.