



Summary of Quarterly Performance Conversation

Date: _____

Employee Name: _____

1. Review of current goals. Are goals still “SMART”?

Revisions needed?

Summary of discussion and progress:

2. Additional resources, support needed?

3. Review components of year-end Performance Evaluation, including all Core Values, Thematic Goals and current Job Descriptions. Any comments, concerns or changes needed?

4. Discuss who should be involved in year-end feedback, and how this information should be captured (i.e., surveys, personal interviews, etc.) Set target date to finalize list of “customers” and questions (no later than November 1st).

Signatures: _____

Employee

Supervisor