

# Reviewing Performance

Formal performance reviews are usually done once or twice a year. For new starters or inexperienced staff, it is a good idea to do their first review after six months, or at the end of a seasonal period, e.g. end of calving, end of mating.

Your employees are more likely to be engaged when you meet with them often. By meeting frequently, you can identify and solve problems before they get too big, and better support your team. If you have been checking in regularly, then nothing discussed in a mid-year or annual performance review will be a surprise.

## Preparing for a performance review

Ahead of the review give your employee an opportunity to self-assess their achievements and reflect on the plan made at the beginning of the year. Also seek feedback from others who work closely with the employee. This will give you a more holistic view of performance and understand any challenges.

Use this template to reflect on areas of their job description where they are performing well and what they could improve, identify achievements, what to focus on, and goals that will work for them and your business.

Agree a time for a performance conversation. Allow at least an hour of uninterrupted time and ensure you have both had time to reflect and prepare questions before the meeting.

## After the conversation

It's important to keep a record of the performance assessment and conversation. After the conversation, send the relevant notes to your employee to help them understand where they need to focus and why, and the commitments to follow through on.

## Tips for great conversations

- Explain the bigger picture – connect performance to the business goals and purpose.
- Be specific – provide specific examples of tasks which are consistently being performed well or not so well.
- Celebrate achievements – recognise wins that your employee has made.
- Work for an understanding rather than a complete agreement – you can agree to disagree.
- Address issues objectively – focus on behaviours rather than personal characteristics.
- Make it a joint effort – give your employees a chance to explain their perspective, input into goal setting, and be open to their feedback about your own performance.
- Set clear expectations – make sure people know what you want them to do and how you want them to do it.

Employee name:	Role title:	Date:
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**Add your performance notes in each section, then take it when you meet with your employee.**

## Performance (What)

<p>Refer to their job description and farm policies for agreed responsibilities.</p> <p>Are they meeting agreed job expectations and goals? Do they deliver a high quality of their work which adds value to the team or business?</p>	<p><b>Notes</b></p>
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<p><b>Suggested questions</b></p> <ul style="list-style-type: none"> <li>• What accomplishments are you most proud of?</li> <li>• Which goals did you meet?</li> <li>• To be the most productive, what are your ideal working conditions?</li> <li>• Which job responsibilities/tasks do you enjoy most?</li> <li>• Which do you least enjoy?</li> <li>• How do you think your role and achievements help the business succeed?</li> </ul>	<p><b>Notes</b></p>
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## Behaviours (How)

Consider how the job is done. Do they work in accordance with the code of conduct and farm policies, and influence the team culture and values in a positive way? Can they anticipate and adapt to change, and take the initiative to do more than is expected?

### Notes

### Suggested questions

- Has there been a time when a task was much harder than you anticipated. What made it so hard? How did you overcome the difficulty?
- Do you feel that the team is working well?

### Notes

## Development

<p>Are there areas of the job which are not yet being performed fully or being underperformed? Provide specific examples of tasks which are consistently not being performed well and require extra training and development.</p>	<p><b>Notes</b></p>
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<p><b>Suggested questions</b></p> <ul style="list-style-type: none"><li>• Which goals fell short? Why? How will you do those differently in the future?</li><li>• What things will you focus on in the next year to help you grow and develop?</li><li>• What can I do to help you better meet your goals?</li></ul>	<p><b>Notes</b></p>
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## Strengths

List what they have achieved recently, and aspects of the job where they are performing very well. Provide specific examples of their strengths.

### Notes

### Suggested questions

- What personal strengths help you do your job effectively?
- What makes you the best fit for your position?
- What kind of work comes easiest to you?

### Notes

## Training Plan

What progress has been made towards the agreed Training Plan? Summarise improvements you would like to see, and what both parties can do to improve their performance into the future.

### Notes

## Manager - Employee Relationship

Identify what you can do to better support them in their role.

### Suggested questions

- Is your workload realistic?
- What do I do that is most/least helpful for you when it comes to completing your work?
- What can we do to improve our relationship?

### Notes