Mid-Year Check In

The Mid-Year Check In is an optional step that can be added to discuss and document progress at mid-year, and make any adjustments to goals or expectations for the remainder of the year. It is meant to be a short recap and is less detailed than the Year End Performance Review.

In order to make it easier to remember accomplishments and results achieved during the year, managers and employees are encouraged to keep notes about their performance all year long in the Performance Journal Form (click here for a copy of this form) or on the Self Assessment Form (click here for a copy of this form).

Mid-Year Check In process steps:

1. Employee enters progress to date on operational and developmental goals, along with any other comments into the Performance Communication Self Assessment Form and sends a copy to the manager (click here for a copy of this form)
2. Manager reviews input from employee and other sources on results to date and enters comments into the Performance Communication Form (click here for a copy of this form)
3. Manager and employee meet to review progress to date and make adjustments if necessary to goals for the remainder of the year. Any other notes or changes as a result of this discussion should be added and both manager and employee keep a copy of the form.

At the end of this discussion, both the manager and employee should walk away with a clear understanding about what the employee has accomplished so far and what he/she plans focus on for the reminder of the year.