

Appendix III – Useful tips on conducting a performance review discussion

To get the best out of the discussion, it is important that both the appraiser and appraisee come to the meeting with prior preparation.

Below are checklists for appraisers and appraisees respectively:

Appraiser's checklist

Category	Checklist items
1. Information gathering	<input type="checkbox"/> The goals and objectives agreed at the last performance appraisal meeting (if applicable) <input type="checkbox"/> The development plan formulated in the last performance appraisal meeting (if applicable) <input type="checkbox"/> The appraisee's job description, key job responsibilities <input type="checkbox"/> The appraisee's accomplishments <input type="checkbox"/> The appraisal form with ratings <input type="checkbox"/> Any other information on the appraisee's performance such as feedback from other team members and customers
2. Questions and suggestions	<input type="checkbox"/> Ideas for improvement or development <input type="checkbox"/> Ideas and questions about career development <input type="checkbox"/> Training needs <input type="checkbox"/> Ideas for an action plan
3. Logistic arrangement	<input type="checkbox"/> A suitable time-slot of around 45-60 minutes with minimum interruptions <input type="checkbox"/> Buffer time after the meeting <input type="checkbox"/> Adequate advance notice for appraisee's preparation <input type="checkbox"/> A place that provides enough privacy and is free from interruption and noise
4. Attitude preparation	<input type="checkbox"/> A positive, fair and open attitude in listening and responding with a frank exchange of views <input type="checkbox"/> A positive tone and language <input type="checkbox"/> Anticipation of the possible reactions from the appraisee

Appraisee's checklist

Category	Checklist items
1. Information gathering	<input type="checkbox"/> A good understanding of the appraisal form <input type="checkbox"/> Examples of achievements, accomplishments or projects <input type="checkbox"/> Any obstacles encountered that may have affected job performance
2. Questions and suggestions	<input type="checkbox"/> Ideas for improvement or development <input type="checkbox"/> Ideas and questions about career development <input type="checkbox"/> Training needs
3. Attitude preparation	<input type="checkbox"/> A positive, fair and objective attitude towards the comments with a frank exchange of views <input type="checkbox"/> A positive tone and language <input type="checkbox"/> Be prepared to listen without interruptions

附錄三 – 工作表現檢討時應注意的事項

為使工作表現檢討會議取得最佳效果，評核人及被評核僱員事前應有所準備。

以下分別是評核人及被評核員工的檢查清單：

評核人的檢查清單

類別	檢查清單項目
1. 搜集資料	<ul style="list-style-type: none"><input type="checkbox"/> 在上次工作表現評核會議協定的目標及方針（如適用）<input type="checkbox"/> 在上次工作表現評核會議訂定的培訓計劃（如適用）<input type="checkbox"/> 被評核僱員的工作說明、主要職責<input type="checkbox"/> 被評核僱員取得的成果<input type="checkbox"/> 已評分的評核表格<input type="checkbox"/> 其他有關被評核僱員的工作表現資料，例如其他同事及顧客的意見
2. 提問及建議	<ul style="list-style-type: none"><input type="checkbox"/> 有助改進或發展的提議<input type="checkbox"/> 有關事業發展的提議及提問<input type="checkbox"/> 培訓的需要<input type="checkbox"/> 行動計劃的提議
3. 後勤安排	<ul style="list-style-type: none"><input type="checkbox"/> 合適的會面時間（約 45 至 60 分鐘），期間盡可能不受干擾<input type="checkbox"/> 會面後預留緩衝時間<input type="checkbox"/> 給予被評核僱員足夠的事前準備時間<input type="checkbox"/> 一個能保障私隱、不受干擾及安靜的會議地點
4. 心理準備	<ul style="list-style-type: none"><input type="checkbox"/> 以正面、公平及開放的態度聆聽及反饋，務求達至坦誠的意見交流<input type="checkbox"/> 運用正面的語調及措辭<input type="checkbox"/> 預計被評核僱員可能作出的反應

被評核僱員的檢查清單

類別	檢查清單項目
1. 搜集資料	<ul style="list-style-type: none"><input type="checkbox"/> 對評核表有充分認識<input type="checkbox"/> 列舉取得的成就或負責項目的例子<input type="checkbox"/> 可能影響工作表現的任何障礙
2. 提問及建議	<ul style="list-style-type: none"><input type="checkbox"/> 有助改進或發展的提議<input type="checkbox"/> 有關事業發展的提議及提問<input type="checkbox"/> 培訓的需要
3. 心理準備	<ul style="list-style-type: none"><input type="checkbox"/> 以正面、公平及開放的態度，在坦誠的意見交流中接納評語<input type="checkbox"/> 運用正面的語調及措辭<input type="checkbox"/> 用心聆聽，避免打斷他人的說話