



**PERFORMANCE MANAGEMENT CYCLE – MONITORING PHASE
ROLES AND RESPONSIBILITIES**

The performance management Monitoring Phase continues throughout the year. At the heart of performance is continuous and meaningful dialogue regarding performance expectations. During the Monitoring Phase, employees and managers/supervisors regularly discuss performance. Each has the responsibility to initiate and participate in informal performance reviews and to participate in performance discussions. During the performance discussion, employees explain what they have accomplished and point out areas in which they need support. In return, managers/supervisors provide feedback on what the employees are doing well and what needs improvement. Performance reviews are also a time when performance plans can be reviewed, and either confirm that they are still appropriate or to modify them as needed. This checklist provides a guide for what employees and managers/supervisors need to accomplish during the Monitoring Phase.

Required Accomplishments by the End of the Monitoring Phase

- The manager/supervisor has a written appraisal based on his or her own notes and the employee’s documented accomplishments.
- The employee may have provided written input based on his or her documented accomplishments.
- The employee has received feedback on performance and adjusted work behaviors accordingly.
- The performance reviews occurred. The performance plan has been adjusted, if needed.

Tasks and Activities

EMPLOYEE	MANAGER/SUPERVISOR
<input type="checkbox"/> Regularly track your performance.	<input type="checkbox"/> Regularly track the employee’s performance.
<input type="checkbox"/> Have continuous and meaningful dialogue with your manager/supervisor and request feedback about your performance.	<input type="checkbox"/> Have continuous and meaningful dialogue with the employee and provide feedback about the employee’s performance.
<input type="checkbox"/> Develop employee input of your performance (voluntary, but highly recommended).	<input type="checkbox"/> Review the agency’s mission and your organization’s goals and priorities to determine if there have been any changes that impact your employee’s performance plan.
<input type="checkbox"/> Enter your employee input into the DoD Civilian Performance Plan, Progress Review and Appraisal, DD Form 2906 and send it to your manager/supervisor.	<input type="checkbox"/> Encourage the employee to write employee input (voluntary, but highly recommended).

Labor and Employee Relations Division

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EMPLOYEE	MANAGER/SUPERVISOR
<ul style="list-style-type: none"> <input type="checkbox"/> Review your performance plan and your notes on your performance. <input type="checkbox"/> Participate in performance discussions to discuss performance thus far, to confirm the relevancy of the current performance plan, and to adjust job elements, if necessary. 	<ul style="list-style-type: none"> <input type="checkbox"/> Review the employee's input, if provided. <input type="checkbox"/> Review your notes on the employee's performance. <input type="checkbox"/> For the performance discussion, set a time and location that is convenient for the employee and. <input type="checkbox"/> Participate in performance reviews with the employee to provide feedback on performance, to confirm that the performance plan is still relevant, and to adjust job elements if necessary. <input type="checkbox"/> Record the performance discussion in the DoD Civilian Performance Plan, Progress and Appraisal, DD Form 2906. <input type="checkbox"/> Look for or approve developmental opportunities such as training, coaching, mentoring, or special assignments for the employee.