

# SOP: Scheduling and Notification of Performance Review Meetings

This SOP details the **scheduling and notification of performance review meetings**, including setting timelines for reviews, coordinating availability between employees and supervisors, sending timely notifications and reminders, preparing necessary documentation, and ensuring clear communication of meeting objectives. The goal is to facilitate timely and productive performance evaluations that support employee development and organizational goals.

## 1. Purpose

To establish a standardized process for scheduling and notifying relevant parties of performance review meetings, ensuring timely, effective, and well-communicated evaluations.

## 2. Scope

This SOP applies to all supervisors, managers, and employees participating in performance review meetings within the organization.

## 3. Responsibilities

- **HR Department:** Coordinates the overall performance review schedule, provides reminders, and maintains records.
- **Supervisors/Managers:** Coordinate with employees for scheduling, prepare documentation, and communicate objectives.
- **Employees:** Confirm availability, prepare self-assessments, and review any relevant materials prior to the meeting.

## 4. Procedure

1. **Establish Review Timelines**
  - HR releases annual or semi-annual review schedule (e.g., Q2 and Q4 of each year).
  - Supervisors are notified at least 6 weeks prior to review cycles.
2. **Coordinate Availability**
  - Supervisors initiate scheduling discussion with employees at least 4 weeks prior to reviews.
  - Use organizational calendar tools to propose available slots compatibly.
3. **Send Meeting Invitations and Initial Notifications**
  - Formal meeting invitations (including date, time, location, and agenda) are sent via email or calendar invite at least 3 weeks in advance.
  - Include attachment or link to any required pre-meeting forms (e.g., self-assessment, previous review).
4. **Send Reminders**
  - Automatic or manual email reminders sent 1 week and 1 day before the meeting.
5. **Prepare Documentation**
  - Supervisors and employees complete all required forms and documentation prior to the meeting.
  - HR or direct supervisor ensures all relevant documents are accessible 2 days before the meeting.
6. **Confirm Attendance and Objectives**
  - Final confirmation sent to both parties 1 day before, reiterating meeting objectives and expected outcomes.

## 5. Documentation and Records

- All invitations, reminders, and confirmations should be archived in accordance with organizational policy.
- Completed review documents should be stored securely and confidentially.

## 6. Communication Guidelines

- All communications must be clear, timely, and professional.
- Instructions and objectives should be explicitly stated.
- Support should be provided for any questions or access issues.

## 7. Review and Update

This SOP should be reviewed annually or as needed based on feedback or changes in organizational policy.

## 8. Appendix: Sample Notification Template

Subject	Performance Review Meeting Scheduled â€™ [Employee Name]
Body	<p>Dear [Employee Name],</p> <p>Your performance review meeting has been scheduled as follows:</p> <ul style="list-style-type: none"><li>• <b>Date:</b> [MM/DD/YYYY]</li><li>• <b>Time:</b> [HH:MM AM/PM]</li><li>• <b>Location:</b> [Room/Video Link]</li><li>• <b>Supervisor:</b> [Supervisor Name]</li></ul> <p>Please review the attached documents and complete your self-assessment prior to the meeting. If you have any questions or need to reschedule, contact [Supervisor/HR Contact].</p> <p>Regards, [Sender Name] [Sender Position]</p>