

Performance Review Checklist

Prior to the meeting

- Identify a time and date that is mutually convenient.
- Avoid re-scheduling!
- Reserve a private place free from phone calls and interruptions!
- Get employee input on his/her accomplishments, concerns, goals.
- (Optional) Get employee-provided list of references: co-workers, customers, etc.
- Seek input from those who interact and work directly with employee.
- Review and compare performance: expectations versus actual.
- Review skills, work experience, training/ future training needs.
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- List major positive and negative incidents (be specific, do not generalize).
- Determine strengths and weaknesses.
- Prepare and prioritize a tentative development plan.
- Establish meeting objectives/agenda.

Conducting the meeting

- Establish an open and positive climate.
- Review the purpose of the evaluation – goal setting and problem solving.
- Discuss performance goals and achievements.
- Discuss strengths and competencies, areas of potential growth.
- Discuss areas of development, opportunity, formal training (if any).
- Encourage employee response.
- Seek agreement on appropriate goals, development and timetables.
- Summarize the meeting. If it is positive, end on a positive note. If it is not positive, reinforce what must occur and set clear deadlines for improvement/consequences.

Follow-up after the meeting

- Prepare a formal, written review document.
- Get employee signature, agreement.
- File copies in personnel file, HR file.
- Provide copy to employee.