Performance Evaluation Process Checklist:

This checklist gives an overview of the three major components to the performance evaluation process. Use this checklist to guide you through the process. Some of the actions are *optional*; however, when completed, those components enrich the experience and gain buy-in to the process and to their development plan.

<table>
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<tr>
<th>STEP IN THE PROCESS</th>
<th>ACTION - DID YOU . . . (CHECK BOX WHEN COMPLETED)</th>
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| **Preparing for the Performance Evaluation Meeting** | ☐ Notify the staff member (approximately **2 weeks** in advance)  
☐ Schedule the meeting in advance; assure you have allowed sufficient time  
☐ Hand out: self-assessment form, the performance program at least **2 weeks** before the scheduled meeting  
☐ Review the performance program  
☐ Review goals from previous review  
☐ Identify accomplishments  
☐ Identify goals for new review period  
☐ Prepare questions to guide the meeting  
☐ Ask the staff member to submit his/her completed self-assessment form before the review  
☐ Request feedback from secondary sources (surveys, comments, peer review, customer comments, letters, etc.)  
☐ Give a copy of the draft, written performance evaluation to the staff member to review before the meeting |
| **The PA Meeting** | ☐ Meet in private  
☐ Provide general feedback followed by specific examples that support the feedback  
☐ Encourage dialogue using prepared and probing questions  
☐ Define needs for the upcoming review period (goals, performance improvement plans, training and development etc.)  
☐ Identify preliminary goals for new performance program  
☐ Discuss changes/modifications for the new performance program |
| **After the Meeting** | ☐ Document the outcome of the performance evaluation discussion  
☐ Describe accomplishments and goals  
☐ Finalize the performance evaluation document, including the final rating of “satisfactory” or “unsatisfactory”  
☐ Obtain employee’s signature on evaluation document  
☐ Keep a copy in department files along with a copy of the supporting documentation  
☐ Confirm the elements of the new performance program  
☐ Give the employee a copy of the evaluation document  
☐ Send the original performance evaluation and performance program document to Human Resources |