

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.

STEP IN THE PROCESS	ACTION - DID YOU . . . (CHECK BOX WHEN COMPLETED)
<i>Preparing for the Performance Evaluation Meeting</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> Notify the staff member (approximately 2 weeks in advance) <input type="checkbox"/> Schedule the meeting in advance; assure you have allowed sufficient time <input type="checkbox"/> Hand out: self-assessment form, the performance program at least 2 weeks before the scheduled meeting <input type="checkbox"/> Review the performance program <input type="checkbox"/> Review goals from previous review <input type="checkbox"/> Identify accomplishments <input type="checkbox"/> Identify goals for new review period <input type="checkbox"/> Prepare questions to guide the meeting <input type="checkbox"/> Ask the staff member to submit his/her completed self-assessment form before the review <input type="checkbox"/> Request feedback from secondary sources (surveys, comments, peer review, customer comments, letters, etc.) <input type="checkbox"/> Give a copy of the draft, written performance evaluation to the staff member to review before the meeting
<i>The PA Meeting</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> Meet in private <input type="checkbox"/> Provide general feedback followed by specific examples that support the feedback <input type="checkbox"/> Encourage dialogue using prepared and probing questions <input type="checkbox"/> Define needs for the upcoming review period (goals, performance improvement plans, training and development etc.) <input type="checkbox"/> Identify preliminary goals for new performance program <input type="checkbox"/> Discuss changes/modifications for the new performance program
<i>After the Meeting</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> Document the outcome of the performance evaluation discussion <input type="checkbox"/> Describe accomplishments and goals <input type="checkbox"/> Finalize the performance evaluation document, including the final rating of "satisfactory" or "unsatisfactory" <input type="checkbox"/> Obtain employee's signature on evaluation document <input type="checkbox"/> Keep a copy in department files along with a copy of the supporting documentation <input type="checkbox"/> Confirm the elements of the new performance program <input type="checkbox"/> Give the employee a copy of the evaluation document <input type="checkbox"/> Send the original performance evaluation and performance program document to Human Resources