Performance Evaluation Planning Checklist

[ ] Be prepared -- know the objectives and goals of the meeting

[ ] Time and Place -- choose a quiet, private spot with as few interruptions as possible

[ ] Conducting the interview

• create a positive environment and help the employee feel at ease
• give balanced feedback, both positive and negative, but start with the positive
• focus on the job, not the person
• describe measurable, observable actions
• ask questions and allow the employee to provide feedback
• when discussing areas for improvement, discuss specific methods and objectives for improving
• discuss possibilities for advancement, the employee's aspirations and professional development necessary to be a candidate for such future positions

[ ] Conclusion

• summarize and review the important points of the discussion
• restate the action steps that have been recommended and provide a time frame for completion
• make sure employee reviews the appraisal and provides comments
• have employee sign it to acknowledge that he or she has read it (does not signify agreement with the content)

[ ] Follow-up

• follow-up with the employee to see how plans are proceeding within the given time frames
• offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles