

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