## Employee Evaluation Checklist

By Alex Strickland

$\square$ Pre-discussion Issues
$\square$ Have job accountabilities been clearly established?
$\square$ Have job accountabilities been defined and prioritized?
$\square$ Have previous performance evaluations identified any issues?
$\square$ Have standards of performance been clearly defined in measurable terms?
$\square$ Has the performance gap been previously discussed with the employee?
$\square$ Are there any obstacles, outside the employee's control, that interfere with job performance?
$\square$ Discussion with Employee
$\square$ Review job accountabilities.
$\square$ Review defined performance standards.
$\square$ Recognize employee strengths and contributions.
$\square$ Explain performance gaps in measurable terms.
$\square$ Check for understanding by having the employee restate your explanation of performance gaps.
$\square$ Discuss improvement ideas, then ask the employee to develop a performance improvement plan for your review.
$\square$ Schedule a follow-up meeting.
$\square$ End meeting on a supportive note.
$\square$ Document the discussion phase; include a summary of what was said, expectations and responsibility.
$\square$ Contact HR if any potential disciplinary or legal issues arise.
$\square$ Follow up Meeting
$\square$ Review issues addressed in first meeting.
$\square$ Solicit employee improvement ideas.
$\square$ Negotiate an improvement plan.
$\square$ Document the plan, progress reviews and provide copy to employee.
$\square$ Establish follow-up timelines.
$\square$ Provide ongoing encouragement and support.
$\square$ Tips for Success
$\square$ Reinforce positive changes as they occur.
$\square$ Recognize and document positive performance improvement.
$\square$ Allow the employee time to talk and listen for understanding.
$\square$ Focus on the issue, not the person.
$\square$ Be specific.
$\square$ Anticipate possible employee reactions and prepare verbal responses.
$\square$ Prepare to handle disagreements.

