Employee Evaluation Checklist

By Alex Strickland

- ☐ Pre-discussion Issues
  - ☐ Have job accountabilities been clearly established?
  - ☐ Have job accountabilities been defined and prioritized?
  - ☐ Have previous performance evaluations identified any issues?
  - ☐ Have standards of performance been clearly defined in measurable terms?
  - ☐ Has the performance gap been previously discussed with the employee?
  - ☐ Are there any obstacles, outside the employee's control, that interfere with job performance?
- ☐ Discussion with Employee
  - ☐ Review job accountabilities.
  - ☐ Review defined performance standards.
  - ☐ Recognize employee strengths and contributions.
  - ☐ Explain performance gaps in measurable terms.
  - ☐ Check for understanding by having the employee restate your explanation of performance gaps.
  - ☐ Discuss improvement ideas, then ask the employee to develop a performance improvement plan for your review.
  - ☐ Schedule a follow-up meeting.
  - ☐ End meeting on a supportive note.
  - ☐ Document the discussion phase; include a summary of what was said, expectations and responsibility.
  - ☐ Contact HR if any potential disciplinary or legal issues arise.
- ☐ Follow up Meeting
  - ☐ Review issues addressed in first meeting.
  - ☐ Solicit employee improvement ideas.
  - ☐ Negotiate an improvement plan.
  - ☐ Document the plan, progress reviews and provide copy to employee.
  - ☐ Establish follow-up timelines.
  - ☐ Provide ongoing encouragement and support.
- ☐ Tips for Success

- ☐ Reinforce positive changes as they occur.
- ☐ Recognize and document positive performance improvement.
- ☐ Allow the employee time to talk and listen for understanding.
- ☐ Focus on the issue, not the person.
- ☐ Be specific.
- ☐ Anticipate possible employee reactions and prepare verbal responses.
- ☐ Prepare to handle disagreements.