Employee Evaluation Checklist

By Alex Strickland

	Pre	e-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 employ- ee?
		Are there any obstacles, outside the employee's control, that interfere with job performance?
	Dis	scussion 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.
	Fo	llow 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.
\neg	Tir	ns 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.