

# 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.