

Performance Review Preparation Checklist

Instructions: Use this checklist to prepare for and as an aide during an employee's performance review.

Environment

- Schedule the meeting and honor that time; avoid reschedules if possible
- Allow adequate time for the review discussion; usually 1 hour
- Select a private, yet neutral and comfortable space
- Guard against interruptions in selected space
- Consider asking employee where they may like to have their review discussion

Goals and Performance

- Review whether work goals were met; address obstacles that impeded goal achievement
- Provide examples of performance strengths; these are the emphasis of the conversation
- Cite areas where development is needed to reach future goals
- Ensure the annual review is NOT the first time poor performance is addressed – no surprises!

Make it a Partnership

- Seek out your employee's opinions; listen non-critically when they are provided
- Check your body language for critical or disapproving messages
- Modify the review document based on what is discussed at the meeting

Growth and Development

- Brainstorm solutions to any skill deficiencies discussed; you help clear the path forward
- Discuss development and career goals OR outline if your organization does that separate from the annual review, address when discussions occur and how to prepare