The Annual Evaluation Conversation

A summary of the story we have been writing together

Name:_____ Date of this conversation:_____

> *This template supports your organization's official evaluation process and does not replace it. Nothing discussed here should be the first time this person hears about a concern or a strength.*

LISTEN FIRST… THEIR VIEW OF THE YEAR

Ask: "As you look back on this year, what are you most proud of, and what was hardest?"

What did they share about their own year… their proudest moments, their hardest moments, and what they want next?

_____
_____
_____

AFFIRM GENUINELY… STRENGTHS AND CONTRIBUTIONS

Name each one specifically: what they did, the strength it showed, and why it mattered.

1.

_____
_____

2.

_____
_____

3.

_____
_____

ADDRESS WITH GRACE… GROWTH AREAS

Be clear about what needs to grow and why it matters, and ask for their perspective.

1.

_____
_____

2.

_____
_____

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LISTEN AGAIN

How did they receive the conversation? Where did we agree, and where did we see things differently?

_____

_____

CLOSE WITH INTENTION… SHARED PRIORITIES FOR THE YEAR AHEAD

Keep it to a small number of priorities, and include what you will do to support each one.

PRIORITY	WHAT SUCCESS LOOKS LIKE	HOW I WILL SUPPORT IT	CHECK-IN

What encouragement did I leave them with as we close this year and begin the next?

_____

_____

First check-in on these priorities:_____ Copy of official evaluation filed? ☐ Yes_____

REFLECT HONESTLY

What did this conversation teach me about this person… and about my own leadership this year?

_____

_____

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