

# Manager Checklist for Performance Evaluations

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The following is a checklist to help managers prepare for the performance evaluation process.

## Plan

- Keep a performance folder on each employee to include notes, comments, goals, accomplishments, etc.
- Set up date and time for private meeting with each employee.
- Ask your employees to create and send a summary of their accomplishments over the last year, assess their performance against goals, and consider their objectives for the upcoming year as well as their career objectives.
- Review each employee's most recent performance evaluation (as applicable).

## Provide a self-evaluation

- Give each employee time to fill out a self-evaluation.
- Review each employee's self-evaluation prior to his or her formal evaluation.

## Evaluation Process

- Pre-work
  - Fill out an evaluation for each employee.
  - Draft next year's goals for each employee based on previous goals and your evaluation of each employee.
- Conduct the performance evaluation
  - Review and discuss performance ratings with the employee.
  - Review and discuss performance against goals with the employee.
  - Collaboratively establish goals for the upcoming year.
  - Discuss career aspirations.
- Complete and submit formal performance evaluation for each employee based on review and discussion with the employee.
- Schedule and carry out regular performance check-ins throughout the year with each employee