

Manager Checklist for Performance Evaluations

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