

Manager Checklist for Performance Evaluations

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

- Keep a performance folder on each employee to include notes, comments, goals, accomplishments, etc.
- Plan the evaluation meetings
 - Set up date and time for private meeting with each employee.
 - Ask your employees to create a summary of their accomplishments over the last year, assess their performance against goals, and think about their objectives for the upcoming year as well as their career objectives.
 - Consider your employees' ability to build relationships.
 - Gather feedback from your employees' peers and clients on their performance.
 - Review each employee's most recent performance evaluation.
 - Review each employee's self-evaluation for this year and reflect on what is said.
- Evaluate performance
 - 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 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