**Annual Performance Review Checklist**

For Managers

*Revised: October 2018*

Annual performance reviews are a key component of employee development. These required reviews are designed to provide a fair assessment of an employee’s job performance (outcomes and behavior). The following checklist provides suggested steps to follow.

*Note: Six-month probationary period reviews are to be completed for all new hires (see Policy HR0135 Probationary Period).*

**At the Beginning of the Annual Performance Evaluation Period (Calendar Year):**

**□** Make sure that the staff member understands how the evaluation process and rating system works.

**□** Define the duties and discuss required staff member contributions to goals and objectives.

**□** Provide the staff member with a copy of the Position Description (PD) and discuss performance expectations.

**During the Evaluation Period:**

**□** Observe employee performance.

**□** Maintain documentation of examples of staff member’s good and bad performance.

**□** Provide continuous feedback on employee performance through occasional meetings during the year.

**□** Monitor progress toward established goals and objectives.

**Before the Evaluation Session:**

**□** Set appointment with the staff member several days in advance.

**□** Ask staff member to complete and return self-evaluation prior to the scheduled review.

**□** Review documentation and other notes related to staff member performance (self-evaluation, goals/objectives, performance issues, etc.).

**□** Prepare goals and objectives for the new review period.

**During the Performance Review:**

**□** Be businesslike but pleasant and informal.

**□** Involve employee and solicit employee comments—encourage discussion.

**□** Discuss goals and objectives for the next review period.

**□** Discuss job duties and performance expectations.

**□** Establish a clear understanding of competencies and rating values. Share specific overall ratings. (Reminder: Communication of the

overall ratings should not be shared until the evaluation has been approved by department leadership).

**□** Agree on Performance Improvement Plan (PIP), if applicable (for a score of 9 or less, PIP required; score of 10-14, PIP encouraged).

**□** Make any necessary adjustments to the written performance review.

**□** Sign the performance evaluation and present to the employee for signature.

**□** Close on a positive note.

**Following the Performance Review:**

**□** Ensure that the PD accurately describes the employee’s job duties. If an employee’s PD needs to be updated, work with

HR Compensation to ensure that all revisions are appropriately updated.

**□** Follow up to ensure that approved training/professional development is being pursued by the employee.

**□** Submit the signed performance evaluation to your immediate supervisor for signature.

**□** Provide a final signed copy of the evaluation to the employee.

**□** Send a final signed copy of the evaluation to HR’s Office of Employee Relations for the employee’s file.