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Performance Appraisal Checklist

1. Schedule the performance appraisal well in advance. Let the employee know if he/she is required to prepare anything for the appraisal meeting such as:
 - A. Accomplishments of the past year/ appraisal period;
 - B. Developmental goals for the coming appraisal period;
 - C. Area of most improvement for the past appraisal period;
 - D. Training needs or desires;
 - E. Performance goals for the upcoming appraisal period;
 - F. Any other materials that are important to consider when constructing the formal appraisal.
2. Prepare the written appraisal by:
 - A. Reviewing the personnel and employee relations file for the past review period for any accomplishments, coaching, discipline, training events, etc.;
 - B. Soliciting feedback from other managers, leads, or project managers;
 - C. Focusing on the key areas of the review and provide succinct, example-based commentary to support your ratings, noting additional examples that you can refer to during the meeting, if needed;
 - D. Identifying areas of continuing development for the coming appraisal period;
 - E. Considering that nothing should be a surprise, decide whether to add items to the review that have not been addressed directly with the employee;
 - F. Asking the employee to provide a self-appraisal; and
 - G. If applicable in your organization, include the 360 degree reviews from employees or managers in the process.
3. Discuss the appraisal with the employee by:
 - A. Scheduling the review well in advance and blocking time so that the review is not interrupted;
 - B. Providing a verbal agenda of the meeting;
 - C. Providing a copy of the appraisal to the employee at the start of the meeting and allowing the employee time for review;
 - D. Explaining the review, highlighting the most important areas;
 - E. Discussing the goals for the upcoming appraisal period;
 - F. Soliciting the employee's interaction and feedback;
 - G. Informing the employee that he/she is welcome to submit a response in writing if desired;
 - H. Setting dates for follow-up meetings with the employee during the upcoming appraisal period, if applicable;
 - I. Agreeing to the future performance goals and developmental plans for the next review period; and
 - J. Providing the employee with a signed copy of the review for his/her records.
4. After the meeting:
 - A. Add notes regarding the meeting to the employees file if needed;
 - B. Make any agreed-upon edits from the meeting to the review;
 - C. Add scheduled follow-up meetings to your calendar;
 - D. Update the HRIS, if applicable; and
 - E. File the signed and delivered appraisal in the personnel file.