

[IMPORTANT: The information and materials contained herein should not be considered or relied upon as legal advice on specific factual situations. Users are urged to consult legal counsel concerning particular situations and specific legal questions.]

Performance Review Checklist

Three months before performance evaluations:

- Send copies of the most recent six-month goals or personal improvement plan to employees to remind them of their commitments and to encourage progress.

Thirty days before performance evaluations:

- Give a personal development plan to each employee to complete before meeting with the reviewer.
- Give performance review forms to all supervisors and managers directly involved with employees on a daily basis to obtain performance feedback.

Ten days before performance evaluations:

- Review all performance review forms completed by supervisors and managers for completeness, fairness, and constructive comments.
- Determine annual compensation adjustments (if appropriate).
- Prepare schedule of individual performance review sessions.
- Notify employees of the dates, times and locations of their reviews and the amount of their compensation adjustments (if appropriate).
- Remind each employee to complete and bring his or her personal development plan to the session.

- Review current personnel files for completeness. Identify performance problems that have occurred during the previous six months and should be discussed during the review session.
- Review attendance records to identify problems that should be discussed during the review session.

Day of the review session:

- Meet with each staff member to discuss his or her performance evaluation and personal development plan.
- Document joint agreements regarding needs for and methods of improvement (include specific responsibilities and deadlines).
- Provide the employee with a copy of joint decisions regarding required performance improvements.
- Keep a copy of joint decisions regarding required performance improvements in the employee's personnel file.

Three months after review sessions:

- Provide each employee with a copy of his or her six-month goals determined during his or her most recent performance review session.
- Review current obstacles to achieving those goals and develop alternatives.