

Performance Evaluation Checklist

- Gather input**
 - Query engineers, managers, and writers – anyone who works with the employee
 - ✓ Ask open-ended questions
 - ✓ Keep feedback private
 - ✓ Always thank them for their input
 - Ask the employee to summarize his or her accomplishments
- Write the evaluation**
 - Identify one or two major themes
 - ✓ Don't overload the PE with too many topics
 - ✓ Pick just one theme for each category on the form
 - Select quotes from your input to support the themes
 - ✓ Make sure the quotes don't reveal anyone's identity
 - Identify suggested actions
 - ✓ Try to tie actions to employees activities and responsibilities
 - Summarize
 - ✓ Tie the summary together using your major themes and actions
- Discuss with the employee**
 - Give the employee a copy of the written evaluation to review before your meeting
 - Schedule the meeting
 - ✓ Pick a private location where you won't be interrupted
 - ✓ Schedule enough time and try not to schedule against a hard commitment
 - Re-read the evaluation before the meeting
 - Make your main points, then let the employee do the talking
 - ✓ A conversation is better than a lecture; you won't learn anything while you are talking
 - Wrap-up with a summary of actions
- Handling difficult situations**
 - Prepare, prepare, prepare
 - ✓ When you have a strong message, take the time to prepare carefully
 - ✓ Work with Human Resources if the employee is in real trouble or if you have any concerns about the discussion
 - Document any required actions and the consequences for not taking action
 - Deliver your message clearly and concisely
 - ✓ Make sure the employee fully understands any required actions and consequences
 - ✓ Stay cool and focused
 - Offer a follow-up meeting, esp. if the employee is angry