

Performance Review Planning Checklist

Preparation				
	Yes	No	Not Required	Comments
Has an agenda for the review been developed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the review time and place been communicated to all parties involved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the Employee Self-Assessment been reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the performance review been measured against organizational performance criteria?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the objectives and goals been identified for the meeting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the agenda, objective, goals, etc., for the performance review been communicated to the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is the location of the review a positive environment to help the employee feel at ease?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is the time of the review convenient for all parties involved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is there ample time allotted for the review to ensure that all agenda items can be sufficiently discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Execution				
	Yes	No	Not Required	Comments
Have the agenda, objective, etc., for the performance review been restated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have organizational changes that will affect the employee been communicated to the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
When addressing aspects of the employee's performance, were methods for improvement discussed where applicable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a preliminary list of future performance evaluation criteria been communicated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the employee been provided with an opportunity to ask questions and to give feedback?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a summary of the employee's performance been communicated with the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Has the employee acknowledged the information discussed during the review by signing the Performance Evaluation Summary Report?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Conclusion				
	Yes	No	Not Required	Comments
Have the employee's contributions, identified during the review, been recognized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has confidence in the employee's performance been adequately communicated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Was the review conducted without bias and were professional ethics/guidelines followed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has an overview of action steps been communicated (including a time frame for completion)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the Staff Performance Evaluation Summary Report been completed and delivered to the employee and Human Resources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a follow-up meeting been set up to discuss open items from the review?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the mid-period review been tentatively scheduled?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a support and monitoring mechanism been established to assist the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	