

Performance Planning Checklist

Name of Employee: _____ Date/Time of Meeting _____ / _____

This checklist has been designed to help you with the preparing for the performance planning meeting with the employee. It is broken into three sections Before the Meeting, During the Meeting and Follow-up.

Before the Meeting

Before you meet with the employee, you need to prepare the following to give to the employee.

- Book a meeting room if required
- Send meeting request to employee or confirm meeting
- CDOT Mission and Goal Poster
- Unit's Work Plan for the current Performance Plan Year
- Print Employee's PDQ (to request a copy email dot_workforce_staffing@state.co.us and provide your relationship to the employee and the reason you need the PDQ)
- Any goals you would like to suggest

During the Meeting

During the meeting you need to discuss the following topics with the employee.

- Take a moment to connect with the employee and identify what is important to them
- Provide the employee with the 3 Peaks Poster and explain how the employee contributes
- Provide the employee with the Unit's Work Plan and discuss the how the employee contributes
- Provide the Unit Work Plan and explain what is expected of the employee and explain your role as the supervisor
- Explain to the employee be evaluated on Accountability/Credibility, Job Knowledge/Performance, Communication/Interpersonal Skills, Customer Service and Safety (Workleading/Supervision only if applicable)
- Discuss with the employee the need to create one or two Performance goals using the S.M.A.R.T (Specific, Measurable, Achievable, Relevant and Time bound) goal format.
- Explain to the employee that after you put the goals into the system they need to acknowledge the goals by April 8th
- Identify Goal 1:

- Identify Goal 2 (optional):

Follow-up

After the meeting there are a couple of items you need to complete.

- Enter the goals for the employee into the system. Click [here](#) if you need help
- Follow-up on any of the items you mentioned you would provide to the employee
- Determine how ongoing communication will occur (team meetings, walk arounds, one-on-ones, targeted performance discussions, etc.)
- How significant events, accomplishments and milestones will be tracked and documented for the rating period