

# Final Performance Review Checklist

Name of Employee: \_\_\_\_\_ Date/Time of Meeting \_\_\_\_\_ / \_\_\_\_\_

*This checklist has been designed to help you with the preparing for the Final performance review 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
- Print Unit's Work Plan highlighting any changes that have occurred between the midyear performance review and the final performance review
- Print employee's PDQ only if there have been changes otherwise use for review
- Gather all supporting documentation for your discussion with the employee (notes about performance from your notebook, emails, etc) to provide specific examples of behaviors
- Write specific examples for each goal and competency area supporting your evaluation of the employee. Provide examples, even if the employee excelled so they know what they are doing right Click [here](#) for help

## 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 Unit Work Plan and explain any changes that have occurred since your last review with employee and explain how the employee work contributes
- Provide the employee with feedback on each of the competency areas and performance goals and provide specific examples of how the employee performed for Accountability/Credibility, Job Knowledge/Performance, Communication/Interpersonal Skills, Customer Service and Safety and performance goals
- Provide the employee with specific examples, based on your notes, of how they performed on their goals
- Explain that the 2<sup>nd</sup> level reviewer is looking at the goals and their final rating will be made available by April 15th
- Explain to the employee that after you put the goals into the system they need to sign by April 22

## Follow-up

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

- Follow-up on any of the items you mentioned you would provide to the employee
- Determine effectiveness of ongoing communication that has occurred during the performance plan year and follow up on suggestions for modifications