# ***Phase 3: Year- End Performance Review, People Manager Preparation Checklist***

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| **Action** | **Questions / Needs / Concerns** |
| **Planning**   * Share the purpose and value of the Performance Management process * Share employee preparation steps and deadlines   + Identify employee’s accomplishments and opportunities; request names for multi-source feedback from employee. If necessary, make adjustments to the provided list and share updates with employee   + Be prepared to share constructive feedback; identify concrete examples of performance |  |
| **Assessment**   * Reflect on the employee’s performance. Leverage own notes from the course of the year and consider multi-source feedback * Review notes from Mid-Year calibration and employee’s Year-End self-assessment * Complete Year-End review document using specific examples and behavioral language to support comments * Review competencies and goals, provide rating for each * Ensure consistent evaluation standards are being used for all team members * Reflect on contribution and provide overall rating |  |
| **Calibration**   * Recap organizational goals * Provide feedback on delivery of goals and competency demonstration (celebrate accomplishments and identify opportunities). Ask employee to share his/her perspective * Communicate rating for each goal and competency and explain overall performance rating * Solicit feedback on leadership style and how to support employee’s success * Identify potential opportunities for development (mentoring, stretch assignments, etc.) |  |
| **Next Steps**   * Summarize outcomes, define next steps * Send signed performance evaluation to HR Partner |  |