# ***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
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| **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
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| **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.)
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| **Next Steps*** Summarize outcomes, define next steps
* Send signed performance evaluation to HR Partner
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