



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

Action	Questions / Needs / Concerns
<p>Planning</p> <ul style="list-style-type: none"> <input type="checkbox"/> Share the purpose and value of the Performance Management process <input type="checkbox"/> Share employee preparation steps and deadlines <input type="checkbox"/> 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 <input type="checkbox"/> Be prepared to share constructive feedback; identify concrete examples of performance 	
<p>Assessment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Reflect on the employee’s performance. Leverage own notes from the course of the year and consider multi-source feedback <input type="checkbox"/> Review notes from Mid-Year calibration and employee’s Year-End self-assessment <input type="checkbox"/> Complete Year-End review document using specific examples and behavioral language to support comments <input type="checkbox"/> Review competencies and goals, provide rating for each <input type="checkbox"/> Ensure consistent evaluation standards are being used for all team members <input type="checkbox"/> Reflect on contribution and provide overall rating 	
<p>Calibration</p> <ul style="list-style-type: none"> <input type="checkbox"/> Recap organizational goals <input type="checkbox"/> Provide feedback on delivery of goals and competency demonstration (celebrate accomplishments and identify opportunities). Ask employee to share his/her perspective <input type="checkbox"/> Communicate rating for each goal and competency and explain overall performance rating <input type="checkbox"/> Solicit feedback on leadership style and how to support employee’s success <input type="checkbox"/> Identify potential opportunities for development (mentoring, stretch assignments, etc.) 	
<p>Next Steps</p> <ul style="list-style-type: none"> <input type="checkbox"/> Summarize outcomes, define next steps <input type="checkbox"/> Send signed performance evaluation to HR Partner 	