**Checklist: Performance Review Meeting**

**Preparation**

[ ]  Know the objectives and goals of the meeting.

[ ]  Anticipate questions and be as prepared as possible to provide explanations.

[ ]  Choose a quiet, private space with as few interruptions as possible.

**Conducting the interview**

[ ]  Create a positive environment and help the employee feel at ease.

[ ]  Give balanced feedback, both positive and negative, but start with the positive.

[ ]  Focus on the job, not the person.

[ ]  Provide examples of both positive and negative behaviors.

[ ]  Ask questions and allow the employee to provide feedback.

[ ]  When discussing areas for improvement, discuss methods and objectives for improving.

[ ]  Discuss possibilities for advancement, the employee's aspirations and professional development necessary to be a candidate for such future positions.

**Concluding the meeting**

[ ]  Summarize and review the important points of the discussion.

[ ]  Restate the action steps that have been recommended and provide a time frame for completion.

[ ]  Make sure the employee reviews the appraisal and provides written comments.

[ ]  Have employee sign the form to acknowledge that he or she has received the appraisal and had the opportunity to discuss the contents. Explain that a signature does not indicate agreement with the content.

**Follow-up**

[ ]  Follow-up with the employee to see how goals and objectives are proceeding within the given time frames.

[ ]  Offer the employee assistance in achieving goals and objectives and encourage discussion of successes and obstacles.