



## Preparing for the Evaluation Checklist

<b>Employee Performance File</b>	
	Previous performance evaluations and documentation specific to the current evaluation period
	Critical incident reports or similar documents
	Attendance records
	Production records
	Discipline records
	Customer feedback, letters of commendation or complaint
	Training records
	Certifications or licensures
	Completed projects
	Completed education, and professional development
<b>Job Description</b>	
	Are the job requirements accurate and complete?
	Do the duties and tasks performed by the employee match those in the job description?
	Is the employee performing duties and tasks that are outside of the job description?
	Does the employee display the knowledge and skills required by the job description?
	Has the employee been assigned tasks and projects that are outside of the scope of the job?
<b>Support Issues</b>	
	Changes to the priority of goals that were identified during the last performance evaluation
	Lack of tools, equipment, support, or other resources
	Outdated or ineffective tools or equipment
	Lack of or insufficient training support
	Insufficient funding for travel, certifications, or licensures
	Lack of planning and direction that result in changing priorities, project deadlines, and urgency
	Lack of decisions or decisions that are not timely, delays in projects and tasks
<b>Changes in Department, Team, Group</b>	
	Changes in the management structure of the department that may have impacted priorities
	Changes to the mission of the department, team, or group based on restructuring or reorganization
	Changes to the goals or objectives for the department, team, or group
	In progress tasks or assignments stopped or abandoned due to a change in direction
	New projects or tasks assigned to employee due to change in department mission, goals, or objectives
	Staffing changes resulting in additional work load for employee
	Changes in funding resulting in canceled training, travel, certifications, licensures, tools, equipment, or support



<b>Employee Self-Assessment</b>	
	Self-assessment completed by employee
	Discrepancies in the understanding of job expectations or how their job fits into the overall department function
	Additional projects and tasks performed that were not planned
	Projects and tasks completed that were outside of the job
	Factors that affected performance
	Lack of support by management
	Accomplishments that may not have been recognized
	Employee goals and the support needed to accomplish them