Performance Appraisal Organizer

1. What tools do I have ready?

A) Job description.................................................................[ ]
B) Performance Tracking Log .............................................[ ]
C) Last employee appraisal ..................................................[ ]
D) Statistics, reports or other information ..........................[ ]
E) Complaint/praise letters ..................................................[ ]

2. Did I give the employee at least 4 weeks’ notice of the appraisal meeting date? [ ]

3. Is the evaluation scheduled in a convenient, private place with enough time reserved for the discussion? [ ]

4. Have I informed the employee of what to expect and how to prepare for the discussion? [ ]

5. What are this employee’s major responsibilities? Have they changed?

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6. What are this person’s major contributions this rating period?

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7. What goals were set for this employee?

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8. What projects or assignments have been done exceptionally well?

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9. What problem or skill deficiencies have I seen in this employee’s performance?

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10. How much support have I provided? How could I have done better to support his/her performance?

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11. What external obstacles may have prevented him/her from doing his/her best job?

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12. What few specific changes would I like from this employee?

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13. What major changes seem to be coming in the next year which would impact this employee’s job?

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14. What special projects or responsibilities could this employee take on next year?

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15. What training or help will he/she need to be successful?

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16. What seems to motivate this person and how can I best address his/her needs and wants for the future?

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