

Formal Performance Appraisal Review Checklist for Employees

In advance of the formal review meeting:

Set up the Meeting:

- Complete a self-evaluation (optional).
- Make suggestions for changes to your job description if needed.
- Review and assess your progress toward achieving your goals
- Draft work goals for the next year
- Draft career goals for the next year
- Review the organization's mission, vision, guiding values and goals in advance.
- Collect documentation you may need to support your appraisal.

The day of the performance review:

- Dress appropriately
- Bring all of the documentation you need to support your performance appraisal discussion
- Bring paper and pen for taking notes.

During the Evaluation

- Identify any differences between your job description and responsibilities, provide examples.
- Identify additional contributions that might not be obvious or missed by your manager in the draft review.
- Listen to the manager.
- Maintain decorum

If there is time:

- Be prepared to discuss your work goals.
- Be prepared to discuss your career goals.
- If another meeting is set to discuss goals or to address issues arising from the performance appraisal, be prepared for the next meeting.

Post-evaluation

- Review the updated performance review routed to you by your manager.
- Document any comments you may have about the appraisal in the employee section of the document.
- Sign and rout the form back to your manager.
- Save a PDF copy or make a hard copy of the appraisal document for your files.