PERFORMANCE EVALUATION CHECKLIST
FOR TOWN OF GREENWICH MANAGERS

When considering performance evaluations, most managers recognize the value of appraising the work of subordinates and the good information that can be gained from these discussions. Yet all supervisors dislike doing them – and Town of Greenwich Managers are no different! But there are ways of making the whole process more comfortable and rewarding for everyone. Below is a checklist designed to help you through the process. If you are not certain how to proceed, or where more information might be helpful, please refer back to the full Performance Evaluation Manual (in the dark blue binder).

Before the Evaluation Meeting:

☐ Locate the employee’s last performance evaluation, and review the goals and/or standards you established for this rating period.

☐ Review the employee’s work and any documents or notes you’ve made since the last evaluation.
  o That way you’ll be sure not to make the mistake of focusing only on recent work

☐ Find a private place to hold the meeting
  o You don’t want to sit behind your desk like a judge
  o Two comfortable chairs set up at a conference table is ideal

☐ Select the date and time to hold the review
  o It is believed that the best time of day is mid-morning
  o Although it may seem like a good idea (for you), Friday is the worst day of the week to evaluate employees, particularly marginal workers. Better to get right to work on changing problem areas than to have the whole weekend to brood.
  o Make sure to give the employee several days’ notice.

☐ Set the Agenda
  o Tell the employee to review the goals and standards you’ll be covering and give him/her a copy of the job description
    ▪ If this is a first evaluation for you or for the employee, take the time to learn and explain how the process works (refer to the Performance Evaluation Manual)
  o It is important to relate performance issues – progress reports -- to the employee between evaluations, so there are really no surprises at this point

☐ List the Employee’s accomplishments
  o This gives managers more credibility and helps employees know that their accomplishments are recognized
  o Again, focus on the entire time span the evaluation covers
  o Be careful not to let the review focus on a single event or problem
**During the Evaluation:**

- Have an interview strategy
  - The more an employee talks, the more you will learn about job performance
    - Apply “active listening” skills – try to ask questions that require extended, thoughtful responses
      - *Don’t ask:* Do you think you’re doing a good job?
      - *Do ask:* Which parts of your job do you feel you do well?
    - Active listening indicates your respect for the employee’s ideas.
  - The more an employee talks, the more s/he will feel understood

- Avoid evaluation pitfalls
  - Don’t personalize – instead focus on the individual’s behavior rather than the individual him/herself.
  - Use specific examples
    - *Don’t say:* You need to focus on getting to work on time
    - *Do say:* You were late to work five times last month or, A review of your time sheets indicates you are late to work at least once every week
  - Don’t concentrate on the negative
    - A well rounded evaluation will also emphasize areas that the employee does well
      - Employees who hear nothing but negative feedback become demoralized and will feel their growth is not recognized

- Establish goals
  - Link employee performance directly with department/division goals
  - Involve employees in the process by empowering them to set their own performance goals
    - This increases their commitment to success
  - Offer guidance and direction instead of criticism
    - Set performance improvement goals together
    - Provide employees with the tools and skills needed to succeed (training, equipment, etc.)
  - Agree on a completion date for every goal established

- End on a positive note
  - Allow time for an open discussion
    - Ask questions about what the employee has learned in the past year
    - Ask what the town can do to make the work environment better
    - Ask how you can be a better supervisor to the employee

**After the Evaluation:**

Evaluating performance on an informal basis is an on-going process. Monitor the employee’s performance throughout the period, making corrections as the need arises. Check with the employee frequently to see if there are problems you can help resolve. Be sure to give balanced feedback, providing both positive and negative feedback routinely – your employee will appreciate your interest and accept your suggestions more readily as s/he becomes accustomed to regular feedback.
# Manager's Self-Rating

**After the Performance Evaluation**

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<thead>
<tr>
<th></th>
<th>Question</th>
<th>No</th>
<th>Somewhat</th>
<th>Yes</th>
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<tbody>
<tr>
<td>1.</td>
<td>Were goals set for future performance?</td>
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<td>2.</td>
<td>Did the employee tell you more than you told him/her?</td>
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<td>3.</td>
<td>Did the employee become aware of his/her performance areas that are appreciated by you?</td>
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<td>4.</td>
<td>Did the employee arrive at improvement ideas himself/herself without having them pointed out first by you?</td>
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<td>5.</td>
<td>Did you learn about the employee’s personal goals?</td>
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<td>6.</td>
<td>Did you relate goals to future performance?</td>
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<td>7.</td>
<td>Did you leave the door open for a continued discussion in the future?</td>
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<td>8.</td>
<td>Did your questions stimulate the employee into discussing problems and other issues openly?</td>
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**Notes:**

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