

## Performance Review Process Checklist

1. The review process should begin **30 days** before the date the review is due.
2. Rater should give a copy of last year's review to the employee. The purpose of reviewing the employee's previous review is for the employee to be prepared to discuss:
  - a. Ratings
  - b. Goals and Accomplishments
  - c. Goals for the upcoming rating period.
  - d. Career desires
3. Agree to a mutual date and time of review. (Note: some raters will request an employee to complete a draft of their review and return it to the rater.)
4. Review employee personnel file, positive and negative issues during the past year, and any documentation relating to performance. Review education and training information supplied by Human Resources.
5. Review Career Ladder
  - a. Compare Career Ladder to employee education and training
  - b. Using Training and Development Catalog, review suggestions for training, cross training, or skill development for employee.
6. Rater will draft review and discuss it with their immediate supervisor before meeting with employee.
7. Meet with the employee and discuss:
  - a. Ratings
    - i. Explain the ratings.
    - ii. Be prepared to give examples for the rating.
  - b. Goals and accomplishments
    - i. For Goals not accomplished, let employee explain
  - c. Career goals
    - i. Discuss required action by employee to reach career goals
    - ii. Discuss required action by City for employee to reach career goals
8. Type review. Employee and rater sign review.
9. Employee adds comments.
10. Department Head signs the review and forwards to Human Resources.

(Please note: Copies should be kept by originating department and a copy should be given to employee.)