

Performance Interview Planning Checklist

Preparation				
Interview Planning Checklist Items	Yes	No	Not Required	Comments
Has an agenda for the interview been developed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the objectives and goals been identified for the meeting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has past performance interview information been obtained?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has performance information for the employee been collected from all applicable sources?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the agenda, objective, goals, etc., for the performance interview been communicated to the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Does the structure of the interview focus on job performance, not personal characteristics?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Does the structure of the interview take into consideration the employee's job description and/or the employee's service description?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the interview time and place been communicated to all parties involved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is the location of the interview a positive environment to help the employee feel at ease?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is the time of the interview convenient for all parties involved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Is there ample time allotted for the interview to ensure that all agenda items can be sufficiently discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Performance Interview Planning Checklist

Execution				
Interview Planning Checklist Items	Yes	No	Not Required	Comments
Is the employee at ease and comfortable within the interview setting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have the agenda, objective, goals, etc., for the performance interview been restated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the employee been given the opportunity to appraise his or her own performance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have organizational changes that will affect the employee been communicated to the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Have possibilities or opportunities for advancement been discussed with the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
When addressing aspects of the employee's performance, were methods for improvement discussed where applicable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a preliminary list of future performance evaluation criteria been communicated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the employee been provided with an opportunity to ask questions and to give feedback?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a verbal summary of the employee's performance been communicated with the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has performance feedback been given, both positive and negative (start with the positive)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the employee acknowledged the information discussed during the interview by signing a performance document?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Performance Interview Planning Checklist

Conclusion				
Interview Planning Checklist Items	Yes	No	Not Required	Comments
Have the employee's contributions, identified during the interview, been recognized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has confidence in the employee's performance been adequately communicated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has the performance review been measured and quantified against organizational performance criteria?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Was the interview conducted without bias and were professional ethics/guidelines followed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has an overview of action steps been communicated (including a time frame for completion)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a written summary of the employee's performance been delivered to appropriate personnel?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a follow-up meeting been set up to discuss open items from the interview?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Has a support and monitoring mechanism been established to assist the employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	