# Performance Interview Planning Checklist

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| **Preparation** |
| **Interview Planning Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |
| Has an agenda for the interview been developed? | [ ]  | [ ]  | [ ]  |       |
| Have the objectives and goals been identified for the meeting? | [ ]  | [ ]  | [ ]  |       |
| Has past performance interview information been obtained? | [ ]  | [ ]  | [ ]  |       |
| Has performance information for the employee been collected from all applicable sources? | [ ]  | [ ]  | [ ]  |       |
| Have the agenda, objective, goals, etc., for the performance interview been communicated to the employee? | [ ]  | [ ]  | [ ]  |       |
| Does the structure of the interview focus on job performance, not personal characteristics? | [ ]  | [ ]  | [ ]  |       |
| Does the structure of the interview take into consideration the employee’s job description and/or the employee’s service description? | [ ]  | [ ]  | [ ]  |       |
| Have the interview time and place been communicated to all parties involved? | [ ]  | [ ]  | [ ]  |       |
| Is the location of the interview a positive environment to help the employee feel at ease? | [ ]  | [ ]  | [ ]  |       |
| Is the time of the interview convenient for all parties involved? | [ ]  | [ ]  | [ ]  |       |
| Is there ample time allotted for the interview to ensure that all agenda items can be sufficiently discussed? | [ ]  | [ ]  | [ ]  |       |
| **Execution** |
| **Interview Planning Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |
| Is the employee at ease and comfortable within the interview setting? | [ ]  | [ ]  | [ ]  |       |
| Have the agenda, objective, goals, etc., for the performance interview been restated? | [ ]  | [ ]  | [ ]  |       |
| Has the employee been given the opportunity to appraise his or her own performance? | [ ]  | [ ]  | [ ]  |       |
| Have organizational changes that will affect the employee been communicated to the employee? | [ ]  | [ ]  | [ ]  |       |
| Have possibilities or opportunities for advancement been discussed with the employee? | [ ]  | [ ]  | [ ]  |       |
| When addressing aspects of the employee’s performance, were methods for improvement discussed where applicable? | [ ]  | [ ]  | [ ]  |       |
| Has a preliminary list of future performance evaluation criteria been communicated? | [ ]  | [ ]  | [ ]  |       |
| Has the employee been provided with an opportunity to ask questions and to give feedback? | [ ]  | [ ]  | [ ]  |       |
| Has a verbal summary of the employee’s performance been communicated with the employee? | [ ]  | [ ]  | [ ]  |       |
| Has performance feedback been given, both positive and negative (start with the positive)? | [ ]  | [ ]  | [ ]  |       |
| Has the employee acknowledged the information discussed during the interview by signing a performance document?  | [ ]  | [ ]  | [ ]  |       |
| **Conclusion** |
| **Interview Planning Checklist Items** | **Yes** | **No** | **Not Required** | **Comments** |
| Have the employee’s contributions, identified during the interview, been recognized? | [ ]  | [ ]  | [ ]  |       |
| Has confidence in the employee’s performance been adequately communicated? | [ ]  | [ ]  | [ ]  |       |
| Has the performance review been measured and quantified against organizational performance criteria? | [ ]  | [ ]  | [ ]  |       |
| Was the interview conducted without bias and were professional ethics/guidelines followed? | [ ]  | [ ]  | [ ]  |       |
| Has an overview of action steps been communicated (including a time frame for completion)? | [ ]  | [ ]  | [ ]  |       |
| Has a written summary of the employee’s performance been delivered to appropriate personnel? | [ ]  | [ ]  | [ ]  |       |
| Has a follow-up meeting been set up to discuss open items from the interview? | [ ]  | [ ]  | [ ]  |       |
| Has a support and monitoring mechanism been established to assist the employee? | [ ]  | [ ]  | [ ]  |       |