



Labor and Employee Relations Division

PERFORMANCE PLANNING CHECKLIST

When developing the performance plan, the employee and manager/supervisor meet to develop the plan and a shared understanding of performance expectations for the coming performance period. The performance plan must be completed within 30 days after the start of the appraisal cycle or the employee's placement in a new position. Review this checklist to make sure you are fully prepared to engage in performance planning with the employee.

EMPLOYEE	MANAGER/SUPERVISOR
<input type="checkbox"/> Request a copy of the organization's goals and the Agency's mission from your manager/supervisor.	<input type="checkbox"/> Provide the organizational goals and the Agency's mission to the employee in advance of the conversation. Prepare to help your employee understand the direct link between his or her assigned duties and goal/mission achievement
<input type="checkbox"/> Review your organizational goals to help you understand their alignment to your assigned duties.	<input type="checkbox"/> Review the employee's performance plan from the previous year
<input type="checkbox"/> Remember to write down questions to ask your manager/supervisor	<input type="checkbox"/> Consider the employee's developmental needs or interests, and any potential barriers to success or challenges that you anticipate the employee might encounter
<input type="checkbox"/> Consider your developmental needs or interests, and any potential barriers to success or challenges that you anticipate encountering.	<input type="checkbox"/> Clearly define, in your own mind, and be prepared to discuss your employee's expected performance and priorities for the upcoming year.
<input type="checkbox"/>	<input type="checkbox"/> Be ready to discuss: <ul style="list-style-type: none"> • Work priorities • Specific tasks the employee should accomplish in order to successfully meet the performance standards • Timelines for completing tasks and any noteworthy milestones