

Employee Evaluation Checklist

A checklist for assessing employee performance against goals, competencies, ratings, and documentation.

Set Evaluation Criteria

- Confirm the goals set for the evaluation period
- List the core competencies the role requires
- Define role-specific skills and behaviors to assess
- Align criteria with company values and standards
- Choose a clear, consistent rating scale
 - Define what each rating level actually means.
- Use the same criteria across comparable roles

Gather Performance Evidence

- Collect data on results against each goal
- Pull metrics, outputs, and project outcomes
- Gather peer or stakeholder input where used
- Review the employee's self-assessment
- Note specific examples for strengths and gaps
- Cover the whole period, not just recent events
 - Avoid recency bias by reviewing the full cycle.

Assess Goal Achievement

- Compare results to each agreed goal
- Judge whether goals were met, exceeded, or missed
- Account for context that affected outcomes
- Distinguish effort from measurable results
- Identify goals that need to roll into the next cycle
- Record evidence supporting each judgment
 - Tie every conclusion to specific facts.

Rate Competencies

- Rate each competency against the defined scale
- Support every rating with a concrete example
- Assess behaviors aligned to company values
- Note clear strengths to build on
- Identify development areas with specifics
- Check ratings for consistency and fairness
 - Calibrate with peers to keep standards aligned.

Document the Evaluation

- Write clear, specific, evidence-based comments
- Summarize overall performance and key themes
- Record final ratings against each criterion
- Keep language objective and professional
- Note development goals and recommended actions

- Store the completed evaluation per your HR process
Retention rules vary; follow local laws and HR guidance.

Prepare to Share Results

- Review the evaluation for accuracy and balance
- Have ratings calibrated or approved as required
- Outline the key points to discuss with the employee
- Prepare to explain the evidence behind each rating
- Plan development actions to propose
- Hand the documented evaluation to the review conversation
The evaluation feeds the review meeting.