

# Employee's Checklist

## Prepare for your performance appraisal

Get the most out of your performance appraisal by actively preparing for it. Don't play a passive role. Come with something to say and help steer the conversation. Give your supervisor a broader picture of your performance and your development and career goals

<b>1. Gather information</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Review your job description and the work expectations you set for the year.</li><li><input type="checkbox"/> Review your last appraisal; look at the feedback and ratings you received.</li><li><input type="checkbox"/> Gather any regular reports you've created (e.g. weekly reports, monthly highlights, project status reports) to help you recall highlights and details.</li><li><input type="checkbox"/> Review "journal notes" in Halogen over the last year. Notice any trends or recurring themes. (If you didn't keep a journal notes, start today. Having details at hand will help both you and your supervisor get a more objective view of your performance over the entire period, and avoid being biased by recent events. It will also make your preparation for your next performance appraisal faster and easier.)</li><li><input type="checkbox"/> Gather any letters, emails, certificates of recognition, awards, etc. that acknowledge performance since your last appraisal, or that identifies challenges or problems with knowledge and performance.</li><li><input type="checkbox"/> Make note of any training or development activities you completed.</li><li><input type="checkbox"/> Think of this as an opportunity to let your light shine. It's OK to brag a little. Your manager may not be aware of all the great things you've done,</li></ul>
<b>2. Prepare a list of your accomplishments</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Prepare a list of your accomplishments. Remember, these are <i>accomplishments</i>, not <i>activities</i>. Don't use this as a diary of all the activities you did.</li><li><input type="checkbox"/> Identify any challenges you encountered along with support you received from others.</li><li><input type="checkbox"/> Don't focus only on the last few months. Look at performance over the whole review period.</li><li><input type="checkbox"/> Think about what your manager needs to know? What do they already know?</li></ul>
<b>3. Complete a self-appraisal form</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Complete your self-appraisal form</li><li><input type="checkbox"/> Go through each Work Expectation and Job Success Factor and rate your performance. Be honest in your ratings. The goal is to share your perception of your performance with your supervisor before your appraisal meeting.</li><li><input type="checkbox"/> Complete the "Comments and Accomplishments" box. Cite specific examples of your work to back up your ratings.</li><li><input type="checkbox"/> Identify work that you're proud of.</li><li><input type="checkbox"/> Think about skills you'd like to use or develop and assignments you have an interest in.</li><li><input type="checkbox"/> Share your self-appraisal with your supervisor.</li></ul>
<b>4. Draft work expectations for the coming period</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Review last year's work expectations. Are there better ways of expressing what you do? Better ways of expressing how well you need to do your work. Or what indicates fully acceptable work?</li><li><input type="checkbox"/> Have any of your job duties changed? Have priorities changed.</li></ul>
<b>5. Prepare an open mind</b>	<ul style="list-style-type: none"><li><input type="checkbox"/> Come into the appraisal discussion ready to listen and consider the feedback you receive.</li><li><input type="checkbox"/> Manage your defensiveness. When you're defensive, you don't listen very well.</li><li><input type="checkbox"/> Ask questions.</li><li><input type="checkbox"/> Disagree with the feedback if you must, but don't argue.</li></ul>