MANAGER CHECKLIST

Set goals that can be assessed

Use this at the start of the performance year.

Employee: _____

Manager: _____ Date: _____

- [ ] Business goals describe specific work outcomes, not just activities.
- [ ] Each business goal has a measure, target, timeframe and evidence source.
- [ ] The employee can explain what is within their control and what depends on others.
- [ ] Development goals name a skill or behaviour to build and how it should appear at work.
- [ ] Development progress will be judged by practice and observable application, not course attendance alone.
- [ ] Business results and development evidence will be reviewed separately.
- [ ] The employee has had a chance to question, clarify and agree the goals.
- [ ] We have scheduled regular check-ins and recorded how priorities may be revisited.

Agreed measures, evidence sources or changes to clarify:

Use alongside your organisation's performance policy. The checklist supports a conversation; it does not replace it.

MANAGER CHECKLIST

Run a useful mid-year review

Check progress, context and support - not just a provisional rating.

Employee: _____

Manager: _____ Date: _____

- [ ] We reviewed evidence against each business goal and its agreed measure.
- [ ] We discussed examples of the employee applying their development goals at work.
- [ ] We considered quality, collaboration and stakeholder or customer impact where relevant.
- [ ] We discussed changed priorities, resources, responsibilities or factors outside the employee's control.
- [ ] We identified obstacles and agreed what support or decisions are needed.
- [ ] We kept business progress and development progress distinct in the notes.
- [ ] We agreed which goals stay, change or stop, and documented why.
- [ ] We set next actions, owners and dates for the next check-in.

Actions, support and revised goals:

Use alongside your organisation's performance policy. The checklist supports a conversation; it does not replace it.

MANAGER CHECKLIST

Hold a fair year-end discussion

Review evidence before calibration; explain the final decision clearly.

Employee: _____

Manager: _____ Date: _____

- [ ] We reviewed outcomes against goals agreed or formally updated during the year.
- [ ] We assessed development through observable examples, not intentions or attendance.
- [ ] We considered changed circumstances and access to opportunities.
- [ ] We invited the employee to add evidence, context and their own reflection.
- [ ] We separated the evidence-based assessment from any forced rating distribution.
- [ ] We explained how calibration or the bell curve affected the final rating.
- [ ] We agreed next year's business priorities and measurable development goals.
- [ ] We recorded the decision, rationale, next steps and follow-up date.

Evidence discussed and next steps agreed:

Use alongside your organisation's performance policy. The checklist supports a conversation; it does not replace it.