

## PERFORMANCE DATA GATHERING CHECKLIST

This checklist will help you to gather performance data throughout the year from a variety of sources, which will support your performance summary of an individual during the appraisal meeting.

### Action

1. Set and agree regular review dates with the individual throughout the year. Use the goals and competency targets as your agenda for each review meeting.
2. Complete a '*Goal Attainment & Evaluation*' and a '*Competency Evaluation*' template for each individual, which details their progress towards their performance targets.
3. Monitor the progress of how well an individual is working towards or attaining their goals on a frequent basis. There are a variety of ways to achieve this some are:
  - Monthly reports
  - Team meetings
  - Project updates & reviews
  - Service & Supplier contracts
  - Training reviews
  - Attainment of qualifications
  - External feedback following an event
  - Etc.
4. Allocate regular opportunities within your work schedule to observe and record your team members':
  - Behaviors
  - Significant incidents
  - Team member interactions.
5. Liaise regularly with all 'third-parties' to collect and collate observations and feedback from the latter on the individual.
  - Team members
  - Suppliers
  - Customers
  - Other departments
  - Other managers.
6. Assess and evaluate how well their actual behavior and performance matches that set in their last appraisal.
7. Offer appropriate feedback as close to the event or observation as possible to maximize its effectiveness.
  - Manage any shortfalls or gaps.
  - Offer coaching and mentoring as necessary
  - Update or amend training or development plans
8. Keep accurate notes of the above and regularly update each individuals '*Goal Attainment & Evaluation*' and a '*Competency Evaluation*' templates.