



## Supervisor Checklist

### ***In advance of the Annual Performance Review:***

#### *Set up the Annual Performance Review:*

- ☐ Set a date and time for the performance review.
- ☐ Ask employee to complete the self-evaluation document. (Recommended)
- ☐ Email a copy of the job description, University's Mission, Vision and Strategic Plan to the employee.
- ☐ Schedule enough time for the meeting (usually one hour).
- ☐ Notify the employee of the meeting and location.

#### *Prepare for the meeting:*

- ☐ Review employee's self-evaluation document (if completed) and job description.
- ☐ Review employee's previous year's goals, if applicable.
- ☐ Review employee's performance documentation.
- ☐ Prepare the Evaluation Form.
- ☐ Draft recommended goals to be discussed during the review.
- ☐ Prepare a list of expectations to discuss.
- ☐ Review and document University and department objectives.
- ☐ Share draft evaluation with your supervisor for input. (Recommended)

#### *The day of the Annual Performance Review:*

- ☐ Arrange for all calls, visitors and interruptions to be avoided.
- ☐ Make the room comfortable (seating, lighting, air temperature, etc.).
- ☐ Bring two copies of the job description.
- ☐ Bring two copies of the Evaluation Form.
- ☐ Bring list of goals and objectives created during the last review, if applicable.
- ☐ Bring performance documentation for support.
- ☐ Bring list of expectations to be discussed.
- ☐ Draft and bring goals for next year.
- ☐ Bring something to take notes.

### ***During the Annual Performance Review***

- ☐ Explain the performance management process and the goals of the Annual Performance Review.
- ☐ Provide employee with a copy of the job description and Evaluation Form.
- ☐ Discuss employee's performance as it relates to the values, behaviors and expectations listed.
- ☐ Actively listen.
- ☐ Maintain decorum.
- ☐ Ask employee about any contributions that were not discussed.

- ☐ Ask employee about obstacles or challenges toward progress.
- ☐ Verify employee has resources needed to be successful.
- ☐ Discuss expectations for the upcoming review period.
- ☐ Work with the employee to develop performance and professional development goals. (Recommended)
- ☐ If there is not enough time to discuss goals, then set another meeting to establish goals. (Recommended)
- ☐ Sign the Evaluation Form and have the employee sign acknowledging receipt of the evaluation.

***After the Annual Performance Review***

- ☐ The employee has 10 days to add comments to the Evaluation Form.
- ☐ Obtain additional appraiser signature.
- ☐ If necessary, work with your HR consultant to update the job description.
- ☐ Send the updated performance review to Human Resources.