



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.