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.