

SUPERVISOR CHECKLIST FOR PERFORMANCE MANAGEMENT PROGRAM



Employee's Name:

Title:

Role: *Administrative/Technical* *Professional* *Manager*

Department:

Supervisor's Name:

Review period:

Date of Review:

Performance Planning

Date completed

Set date with employee for performance planning meeting. _____

Collect copies of university, planning unit, and department mission statements, values, and goals as well as employee position description. _____

Provide copy of all documents to employee prior to conversation. _____

Set dates for coaching sessions _____

Performance Planning Meeting:

- _____ Discuss the process of this system.
- _____ Share forms to be used in performance management process.
- _____ Answer questions related to process and forms.
- _____ Discuss how employee's position relates to university, planning unit, and department missions.
- _____ Establish goals for the year.
- _____ Discuss employee's expectations of supervisor in process.
- _____ Set time-line for employee completion of major projects, as appropriate.
- _____ Establish professional development needs for achievement of competencies.
- _____ Define resources needed for professional development.
- _____ Review dates for future coaching sessions.
- _____ Prepare and sign Performance Planning Form (#PM2) containing above information.
- _____ Identify multiple assessors.
- _____ Come to agreement about the use of the Supervisor Feedback Form (#PM3).

#PM4

Mid-year review:

- _____ Discuss progress toward goal achievement.
- _____ Discuss progress toward competency development.
- _____ Review time-line and make adjustments as appropriate.
- _____ Discuss changes in work environment that impact employee performance.
- _____ Note changes to Performance Planning Form (#PM2).
- _____ Identify resources needed to meet goals.

Preparation for year-end performance review:

- _____ Employee prepares self-evaluation.
- _____ Supervisor drafts performance management form.
- _____ Supervisor gathers multiple assessor feedback, if appropriate.
- _____ Review Employee Self-Evaluation Form (#PM5), if appropriate.

Year-end performance management assessment:

- _____ Review Performance Management Review Form (#PM1).
- _____ Review supervisor's draft of performance management tool.
- _____ Discuss how employee's expectations of supervisor have been met.
- _____ Discuss any other issue(s) employee chooses.
- _____ Make changes to forms.
- _____ Discuss multiple assessor feedback, if appropriate.

Notification of compensation and rewards:

- _____ Review final form.
- _____ Discuss reward allocation.

Supervisor