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| **Before the Annual Performance Evaluation** | **Timeframe:** |

Schedule the Meeting

Set the appointment date

Advise the employee to complete a self-review

Schedule sufficient time for the meeting (consider setting aside a minimum of an hour)

Provide employee with the meeting logistics (date, time, location, etc.)

Prepare for the Evaluation

Review the employee’s self-review

Review employee’s position description

Write a draft performance evaluation

Submit the draft performance evaluation to the reviewer; discuss questions or concerns

Arrange for calls, visitors and other interruptions to be avoided on day of evaluation

Ensure relevant materials are prepared and copies are available for employee

* Position description
* Draft performance evaluation

|  |  |
| --- | --- |
| **Post-evaluation** | **Timeframe:** |

Modify draft performance evaluation (if needed)

Finalize and sign-off on performance evaluation

Submit final evaluation to the reviewer for sign-off

Provide the evaluation to the employee for review and signature

Submit the signed evaluation to the Office of Human Resources; maintain a copy for your records