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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

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| **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