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| **Before the Planning Stage Discussion** | **Timeframe:** |

Schedule the Meeting

Set the appointment date

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 Planning Stage Discussion

Gather & review the current position description

Gather & review previous performance evaluation(s)

Provide a copy of the current position description to the employee

Review University and department strategy and goals; discuss with reviewer (supervisor’s supervisor) to ensure that overall vision is aligned

Provide information on University and department strategy and goals to the employee

Arrange for calls, visitors and other interruptions to be avoided during planning stage discussion

Ensure relevant materials are prepared and copies are available for employee

* Position description
* Planning stage form

|  |  |
| --- | --- |
| **After the Planning Stage Discussion** | **Timeframe:** |

Submit completed form to employee for signature

Finalize and sign-off on planning stage

Provide a copy of the co-signed planning stage document to the employee

Maintain a copy of the planning stage for your records