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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