

Leading Effectively Through Performance Development
A Supervisor's Checklist for Mid-Year & Annual Performance Evaluation Meetings

Task / Responsibility	Direct Report	Supervisor
Prepare a meeting agenda to ensure all key points are covered and provide to employee in advance & ensure the time and location work for all		X
Review the employee's last performance review or notes from the last performance discussion (talking more frequently will make this easier); ensure language is as objective as possible & supporting examples (positive & other) when possible		X
Review the position description and be prepared to discuss any changes to the job during the year	X	X
Review the RICE MILE or other School/Division values for performance - document examples of strengths / areas for improvement	X	X
Review established goals and document outcomes of the work	X	X
Seek input from others (as relevant and appropriate)	X	X
Ask the employee for a self-evaluation - provided to you in advance		X
Identify variances between your evaluation and the employee's self-evaluation and be prepared to discuss these differences		v
Develop and ask powerful questions to engage a two-way conversation	X	x
Create outline of talking points where bulk of review is on current work/performance, strengths (weaknesses are put into context); consider the messages that you want to ensure are delivered		X
Plan for career development opportunities	X	X
Plan for a positive close to the review meeting & ensure clarity		X
Rehearse conversation prior to review discussion		X
Plan for next steps	X	X
Complete process (paperwork, notifications, etc.) & ensure employee is clear on process		
Other		

Notes: