

**Supervisor Checklist for TEAMS and USPS Performance Evaluations**

	<b>STEPS</b>	<b>NOTES</b>	<b>Employee</b>	<b>Supervisor</b>	<b>2<sup>nd</sup> Level</b>
1.	Ask employee to complete self-assessment and goals for coming year – February/beginning of March			X	
2.	Employee completes self-assessment - voluntary	Given to supervisor when finished	X		
3.	Review employee’s position description ○ Contact Tina Litchfield if an update is in the works	○ Substantive changes require 2 <sup>nd</sup> level supervisor approval ○ Formatting and minor changes can be processed without additional approval		X	X
4.	Draft evaluation ○ Include goals for the coming year	○ Supervisor should have employee’s self-assessment and position description ○ There should be no surprises for the employee		X	
5.	Submit draft evaluation to 2 <sup>nd</sup> level supervisor for review and approval			X	
6.	Review draft evaluation and provide feedback to supervisor	Make sure the following is included: ○ Specific and substantive feedback on performance ○ Goals that are specific and provide a timeline			X
7.	Return draft evaluation to supervisor with comments and changes – and/or approval				X
8.	Schedule meeting with employee	When ready to share evaluation after 2 <sup>nd</sup> level supervisor <u>approval</u>		X	
9.	Provide the employee with the evaluation several days prior to the evaluation			X	
10.	Conduct evaluation meeting <ul style="list-style-type: none"> <li>• Set time aside</li> <li>• Don’t answer your phone/minimize distractions</li> <li>• Conduct the meeting in a private place</li> <li>• Be present</li> <li>• Be curious</li> <li>• Allow for input</li> </ul>	○ Summarize your thoughts on the performance (don’t read evaluation) ○ Ask what the employee’s thoughts are – did you miss any big projects or contributions? ○ If the employee disagrees with content let them know they can submit a response to the evaluation		X	
11.	Finalize evaluation	○ If you made <u>error(s)</u> , such as misspelling/dates/etc., make the corrections ○ Evaluation should have signatures of supervisor, 2 <sup>nd</sup> level supervisor, and employee – even on the form for exempt employees that doesn’t have a space for 2 <sup>nd</sup> level signature – just improvise ○ Conflict of interest section should be completed ○ Employee signs last ○ Updated PD <u>must</u> be attached and a note included that the PD is updated so Libraries’ HR can submit to UF HR	X	X	X
12.	Submit evaluation <u>electronically</u> by March 31 – to Libraries’ HR ( <a href="mailto:uf_lib_hr@uflib.ufl.edu">uf lib hr@uflib.ufl.edu</a> )	Employee keeps the original signed hard copy.		X	