

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

	<b>STEPS</b>	<b>NOTES</b>	<b>Employee</b>	<b>Supervisor</b>	<b>Chair</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 (PD) with employee <ul style="list-style-type: none"> <li>○ Contact Juliana Rojas with questions</li> <li>○ Secure signatures</li> </ul>	<ul style="list-style-type: none"> <li>○ Employee and supervisor signatures and date required on PD</li> </ul>	X	X	
4.	Draft evaluation <ul style="list-style-type: none"> <li>○ Include goals for the coming year</li> </ul>	<ul style="list-style-type: none"> <li>○ Supervisor should have employee’s self-assessment and PD</li> <li>○ There should be no surprises for the employee</li> </ul>		X	
5.	Submit draft evaluation to Chair/equivalent for review and approval			X	
6.	Review draft evaluation and provide feedback to supervisor	Make sure the following is included: <ul style="list-style-type: none"> <li>○ Substantive feedback on performance</li> <li>○ Specific goals with timeline</li> <li>○ Position Description</li> </ul>			X
7.	Return draft evaluation and PD to supervisor with comments and changes – and/or approval				X
8.	Schedule meeting with employee	When ready to share evaluation after Chair/equivalent <u>approval</u>		X	
9.	Provide the employee with the evaluation several days prior to the meeting			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/can be virtual</li> <li>• Be present</li> <li>• Be curious</li> <li>• Allow for input</li> </ul>	<ul style="list-style-type: none"> <li>○ Summarize your thoughts on the performance (don’t read evaluation)</li> <li>○ Ask what the employee’s thoughts are – did you miss any big projects or contributions?</li> <li>○ If the employee disagrees with content, let them know they can submit a response to the evaluation</li> </ul>		X	
11.	Finalize evaluation	<ul style="list-style-type: none"> <li>○ If you made <u>error(s)</u>, such as misspelling/dates/etc., make the corrections</li> <li>○ Evaluation should have signatures of supervisor, Chair/equivalent, and employee</li> <li>○ Employee signs last</li> <li>○ Updated PD <u>must</u> be signed and attached, noting changes in the Position Change Action at the bottom of the PD template</li> </ul>	X	X	X
12.	Submit evaluation <u>electronically</u> by March 31 – to Libraries’ HR ( <a href="mailto:Juliana.rojas@ufl.edu">Juliana.rojas@ufl.edu</a> )	Employee keeps the original signed hard copy.		X	