

Supervisor Checklist for Staff Performance Evaluations (TEAMS & USPS)

	STEPS	NOTES	Employee	Supervisor	Chair
1.	Encourage employee to complete self- assessment and goals for coming year – February			X	
2.	Employee completes self-assessment - Recommended	Given to supervisor when finished	X		
3.	Employee & Supervisor review employee’s Position Description (PD) and update as necessary o Contact Tina Litchfield with questions	o Employee and supervisor signatures and date required on reviewed and updated PD	X	X	
4.	Draft evaluation o Include goals for the coming year	o Supervisor should have employee’s self-assessment and PD o There should be no surprises for the employee		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: o Substantive feedback on performance o Specific goals with timeline o Position Description			X
7.	Return draft evaluation and PD to supervisor with comments and changes – and/or approval				X
8.	If assigning Exceptional, Needs Improvement, or Unsuccessful, draft evaluation must be submitted to LHR prior to meeting with employee	Deadline for preliminary review o March 30th		X	
9.	Schedule meeting with employee	When ready to share evaluation after Chair/equivalent approval and LHR as appropriate		X	
10.	Provide the employee with the evaluation several days prior to the meeting			X	
11.	Conduct evaluation meeting o Prepare o Conduct the meeting in a private place/can be virtual o Be present o Be curious o Allow for input	o Summarize your thoughts on the performance (don’t read evaluation) o Ask what the employee’s thoughts are – did you miss any big projects or contributions? o If the employee disagrees with content, let them know they can submit a response to the evaluation		X	
12.	Finalize evaluation	o If you made <u>error(s)</u> , such as misspelling/dates/etc., make the corrections o Evaluation should have signatures of supervisor, Chair/ equivalent, and employee o Employee signs last o Reviewed PD <u>must</u> be signed and attached. Please note any changes that were made in the “Position Change Action” section at the bottom of the PD	X	X	X
13.	Submit evaluation <u>electronically</u> by April 22nd – to Libraries’ HR (Juliana.rojas@ufl.edu)	Employee keeps the original signed hard copy.		X	