Supervisor Performance Evaluation Checklist

Supervisors can use the checklist to ensure that the required steps are taken:

At the Beginning of the Performance Evaluation Period:

☐ Make Sure that the staff member understands how the evaluation process and rating system works
☐ Define the duties, discuss required staff member contributions to goals and objectives
☐ Provide the staff member with a copy of the job description and discuss performance standards for each core performance value and overall rating

During the Evaluation Period:

☐ Observe staff member performance
☐ Maintain documentation of examples of staff member’s good and bad performance
☐ Communicate on a continuing basis through informal evaluation
☐ Monitor progress toward established goals or individual development plan

Before the Review Session:

☐ Set appointment with the staff member several days in advance
☐ Ask staff member to complete self-assessment form
☐ Review documentation and other notes related to staff member performance
☐ Review selected competencies and goals
☐ Arrange a private setting
☐ Prepare preliminary staff member future goals for the new review period
☐ Plan for specific performance improvement notice and/or performance action if applicable

During the Initial Review Session:

☐ Be businesslike but pleasant and informal
☐ Involve employee and solicit employee comments – encourage discussion
☐ Discuss future goals for the next review period
☐ Establish a clear understanding of competencies and rating values – share specific overall ratings.
☐ Communication of the overall ratings should not be shared until the evaluation has been approved by management
☐ Agree on individual development plan (IDP) if applicable
☐ Close on a positive note

Completing the Evaluation and Sharing the Ratings with the Employee:

☐ Provide a copy of the evaluation to the employee
☐ Send a copy of the evaluation to HR for the employee’s personnel file

Preparing for the Next Evaluation Review Period:

☐ Ensure that the job description accurately describes the employee’s job duties. If an employee’s job description needs to be updated, work with HR to ensure that all revisions remain within the job specifications for the position
☐ Follow up to ensure that approved training/professional development is being pursued by the staff member