

Supervisor Checklist for TEAMS and USPS Performance Evaluations

	STEPS	NOTES	Employee	Supervisor	2nd Level
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 o Contact Tina Litchfield if an update is in the works	o Substantive changes require 2 nd level supervisor approval o Formatting and minor changes can be processed without additional approval		X	X
4.	Draft evaluation o Include goals for the coming year	o Supervisor should have employee’s self-assessment and position description o There should be no surprises for the employee		X	
5.	Submit draft evaluation to 2 nd level supervisor for review and approval			X	
6.	Review draft evaluation and provide feedback to supervisor	Make sure the following is included: o Specific and substantive feedback on performance o 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 nd 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"> • Set time aside • Don’t answer your phone/minimize distractions • Conduct the meeting in a private place • Be present • Be curious • 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	
11.	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, 2 nd level supervisor, and employee – even on the form for exempt employees that doesn’t have a space for 2 nd level signature – just improvise o Conflict of interest section should be completed o Employee signs last o 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 30 – to Libraries’ HR (Danielle Sessions)	Employee keeps the original signed hard copy.		X	