

# Overview

## I. PLANNING

At the beginning of an annual review period (July – September):

- Supervisor and employee have a Performance Planning conversation.
- Develop and document at least three (3) SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) performance objectives.
- Discuss [University Shared Values](#) and desired behaviors.
- Set two (2) Professional Development Goals.

## II. Check-in Meetings (Coaching and Feedback)

Coaching employees for improved performance is an integral part of performance management. The supervisor will:

- Hold at least two (2) check-in (coaching/feedback) sessions throughout the performance cycle (October – December and January – March).
- Meet with the employee and provide coaching and feedback related to the performance objectives, university shared values, and professional development goals, adjusting if necessary.
- Document conversation in the coaching notes section of each objective/goal.

## III. Self-Evaluation

Required completion by the employee (by May 31):

- Employee documents/summarizes their annual accomplishments.
- Employee and Manager review and discuss.
- Manager references information for the Year-End Performance Review.

## IV. Year-End Performance Review

A supervisor's preparation for year-end performance reviews is incremental, completed throughout the year. At the end of the annual review period (by June 30) the supervisor will:

- Document results for each performance objective and professional development goal.
- Determine appropriate references to the University Shared Values in comments.
- Provide a written summary of the annual performance.
- Rate overall performance based on results of goals, objectives, and the University Shared Values.
- Schedule and conduct a year-end performance review discussion.
- Both supervisor and employee must sign to complete the evaluation process.