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|  | **Explain the process.** | Meet with your employees to explain the performance management process. Emphasize that it is a process (not an event) that provides UAB employees with the opportunity to set goals, discuss expectations, and develop themselves as professionals.  |
|  | **Prepare for each planning meeting.** | Prepare to meet individually with each employee by thinking about your expectations for this individual and how this person’s role fits in with your goals for your department or unit. You will also want to review the individual’s job description. Make sure that your employee prepares for the meeting by thinking through his or her proposed goals for the year.  |
|  | **Conduct planning meetings.** | Meet one on one with each of your employees. There are three main objectives for this meeting: to identify expectations for your employee, set a few developmental goals for your employee, and to articulate how those goals fit with broader departmental goals.  |
|  | **Help each employee create a professional development plan.** | Your employees’ plans should include a range of development activities designed to help them meet their goals. *Resources: Professional Development Plan Template.* |
|  | **Support implementation.** | As they work to implement their plans, support them by identifying additional opportunities for development as needed and by removing obstacles so that they can accomplish their goals.  |
|  | **Check-in with employees on their progress.** | It is critical that you discuss your employee’s progress on his or her plan at regular points throughout the year. You might consider holding regularly scheduled development check-in meetings or building that in as an agenda item to existing staff meetings. By checking in with employees, you can encourage and motivate your employee and reassess if the employee has gotten off track.  |
|  | **Provide coaching throughout the year.** | Coaching your employees throughout the performance management process is as simple as listening to them. Keep in mind that positive reinforcement and praising employees for small achievements will keep them on track to accomplishing their goals. |
|  | **Prepare for the evaluation meeting.** | Review the goals you set with your employee at the beginning of the year. Review any notes you may have taken about the employee’s performance during check-ins or other meetings. Complete a draft of the performance evaluation. *Resources: Performance Evaluation Form.* |
|  | **Ensure that your employee prepares too.** | Ask your employee to review the goals you set at the beginning of the year. Also ask your employee to complete a self assessment using the Performance Evaluation Form. The self assessment is critical. *Resources: Performance Evaluation Form.* |
|  | **Conduct evaluation meeting.** | The performance evaluation meeting should be an opportunity for you and your employee to have a candid, productive discussion. Do your best to make the employee comfortable, provide constructive feedback, and end with praise.  |

**EVALUATE**

**IMPLEMENT**

**Performance Management Checklist**

**PLAN**

Performance Management is an ongoing cycle in which supervisor and employee team up to achieve UAB’s mission by linking employee development with organizational goals. The following checklist is designed for supervisors to use as they take employees through the performance management cycle. The checklist provides step by step instructions and resources to ensure that supervisors have what they need to help employees perform at their highest capacity.

**RECOGNIZE**

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|  | **Document evaluation meeting.** | Immediately following the meeting, you’ll want to write up any additional notes and save the notes in a place that can be easily accessed in the future. This is particularly important for evaluation meetings with poor performers. |
|  | **Revise evaluation if necessary.** | It is now time to finalize the performance evaluation form. If there are any changes you need make to your evaluation based on the evaluation meeting, make those changes and make sure you communicate them to the employee. |
|  | **Submit evaluation.** | Follow protocol for your school/division to ensure that the evaluation is filed appropriately. You should also submit a copy of all evaluations to HR Records. |
|  | **Reward star performers.** | Identify opportunities to reward your highest performers. If possible, provide higher annual raises to those employees who had the best performance evaluations. If raises are not available, consider alternative rewards such as increased autonomy or leadership positions. You will want to discuss these rewards with your employees to find out what motivates them.  |
|  | **Recognize star performers.** | Identify opportunities to recognize your highest performers. Consider nominating them for various recognition programs at UAB, including Employee of the Month or other school or department specific programs.  |