



2020

## STAFF PERFORMANCE EVALUATION CHECKLIST

**WHEN:** The performance evaluation period for reviews will be March 1, 2019 through the later of May 31, 2020, or the day evaluations are submitted to Human Resources. The deadline to return all completed and signed performance evaluations is May 31, 2020.

**WHY:** The College’s annual staff performance evaluation is intended to be one part of a comprehensive performance management program with also includes having well-written job descriptions, communicating expectations, giving regular performance feedback, goal setting, recognition, and job and career development.

**WHAT:** Forms and resources are available on the [HR Website](#). Some departments may utilize an optional online performance review template in Workday. Please check with your department Vice President for confirmation.

**HOW:** The following checklist will assist you to navigate the process.

CHECK WHEN COMPLETED	WHAT TO DO
	<b>Talk</b> to your supervisor/VP to confirm what is expected of you (e.g. use of a specific form, self-evaluations)
	<b>Ask</b> your VP if he/she wants to see your staff evaluations and, if so, confirm when that will occur (i.e. draft, final). Does the VP want to sign evaluations?
	<b>Decide</b> if you want your staff member(s) to complete a self-evaluation, and if so, if you will create one or use one that is available on the HR website.
	<b>Set the stage</b> by meeting briefly with each of your staff members to let them know when you will be conducting evaluations, what you expect regarding a self-evaluation, and the period of time that spans the review period.
	<b>Be prepared</b> by reviewing former evaluations, job descriptions and any performance documentation pertaining to the staff member. If you are a new supervisor, contact HR to review past evaluations.
	<b>Decide</b> if you need to obtain feedback from others who have worked with your staff member(s).
	<b>Decide</b> how you will document the evaluation. Use one of HMC’s evaluation forms available on the HR website. Document the evaluation and provide an overall evaluation.
	<b>Draft the evaluation</b> before or after you meet with your staff member. To help your staff member understand your assessment, include specific examples that support your comments.
	<b>Meet with your staff member</b> and use the evaluation form and the self-evaluation to guide your discussion. You may also want to refer to the job description during your meeting. Make sure you schedule enough time to have a productive conversation and that you meet in a private location. Remember to listen, ask questions, and express your appreciation for your staff member’s participation in the meeting.
	<b>Finalize the evaluation;</b> make any changes that are a result of your meeting.
	<b>Obtain signatures</b> by the staff member and sign the evaluation as the supervisor. If applicable, obtain the signature of your next level supervisor/VP. If a staff member declines to sign, please make a note on the evaluation that states they were provided the evaluation and decided not to sign it. You still need to sign the evaluation as the supervisor.
	<b>Complete the final evaluation</b> by sending a copy to HR (original or electronic). Be sure to keep a copy for your records and provide a copy to your staff member.

Please direct any questions to [hr@hmc.edu](mailto:hr@hmc.edu).