



# SOUTHWESTERN UNIVERSITY

## Supervisor's Evaluation Timeline

Start Date: March 7, 2019

### 1. Receive Evaluation Forms from HR

- Save the forms to your computer.
- Take the Evaluations for a test drive!
  - If you have any problems opening the forms, entering data, using the dropdowns, etc., contact Human Resources.
- Have there been **significant** changes to the employee's primary duties? If so, request a current job description from Human Resources to edit.

### 3. Schedule Evaluation Meetings

- Schedule the evaluation meeting - allow sufficient time for discussion.
- Send the employee a copy of the evaluation a couple of days prior to the evaluation meeting.
- If an employee's evaluation includes some Unsatisfactory ratings, discuss this situation with your supervisor prior to meeting with the employee.

### 5. The Completed Evaluation

- Ask if the employee is ready to sign their evaluation or if they wish to add comments.
- Sign and forward the evaluation and any amended job descriptions to your supervisor for review and approval.
- Send the fully reviewed and approved forms to the Human Resources department for further processing by **April 30, 2019**.

### 2. Complete Your Evaluations

- Refresh your evaluation completion skills! See **Quick Tips** and **FAQ's**.
- Evaluation Period: **January - December, 2018**
- Employees hired after October 1 will not receive an evaluation because they were still in their "Initial evaluation period."
- Consider whether to include suggested goals or to ask the employee to bring proposed goals when you meet.
- Need more assistance? Contact Human Resources.

### 4. Evaluation Meetings

- Encourage open and honest discussion.
- Verbally review the University's Core Values with the employee, noting them as the basis for all activities and programs at Southwestern University.
- Review the evaluation with your employee.
- Ask the employee if there have been any **significant** changes to their primary responsibilities – note them on the job description.
- Avoid spending too much time on any one item.
- Keep the meeting on track.

End Date: April 30, 2019

Need assistance? Call Human Resources at ext. 1435.