Staff Performance Appraisal Process – PLANNING WORKSHEET

The planning worksheet is a tool for managers and employees to outline the major tasks associated with the staff performance appraisal process. The tool may be modified for use in planning and communicating the process within your office, department or college/school.

<table>
<thead>
<tr>
<th>Step</th>
<th>Task Description</th>
<th>Timeline</th>
<th>Responsible Person</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>Define the scope of performance appraisals</td>
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<td></td>
<td>• Determine the number of appraisals</td>
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<td></td>
<td>• Define the necessary timeline for completing all appraisal activities</td>
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<td></td>
<td>• Review current position description</td>
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<td>2.</td>
<td>Employee self-appraisal</td>
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<td></td>
<td>• Review accomplishments and areas for improvement</td>
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<td></td>
<td>• Complete self-appraisal</td>
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<td></td>
<td>• Send completed self-appraisal to manager</td>
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<td>3.</td>
<td>Manager’s evaluation of employee’s performance</td>
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<tr>
<td></td>
<td>• Review accomplishments and areas for improvement</td>
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<td></td>
<td>• Complete appraisal</td>
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<td></td>
<td>• Return completed appraisal to employee before the discussion, allowing time for reflection</td>
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<td></td>
<td>• Discuss employee overall rating with second-level reviewer: refer to <a href="#">Proposed Ratings Approval form</a></td>
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<td>4.</td>
<td>Performance appraisal discussion</td>
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<td></td>
<td>• Schedule meeting for manager and employee</td>
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<td>5.</td>
<td>Signature and copies</td>
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<td></td>
<td>• Complete employee and manager signatures</td>
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<td></td>
<td>• In the instance of a &quot;Below Expectations&quot; or &quot;Unsatisfactory&quot; rating, a second-level reviewer signature is required</td>
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<td>• Make and retain appraisal copies</td>
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<td>6.</td>
<td>Submit completed appraisals to the Office of Human Resources</td>
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