



Guide to Supervisory Meetings

Supervisors and supervisees are expected to engage in a minimum of four meetings a year. These meetings should last at least 30 minutes and should take place in a mutually agreed upon space, which may be the office of either the supervisor or the supervisee. Please note that the videos referenced in this document are only intended as a resource and every supervisor should have a discussion with their own supervisor before implementing any new major human resources initiative in their department.

Expectations and Goals (November/December)

- Suggested video resource: [*Performance Management: Setting Goals and Managing Performance*](#)
- Supervisor will deliver list of expectations to the supervisee no less than two business days prior to the scheduled meeting.
- Supervisor and supervisee will discuss their mutual understanding of the expectations
- Both the supervisor and the supervisee will fill out a goals sheet and discuss their goals for the next calendar year. Supervisors and supervisees should discuss how the other individual may play a role in supporting or assisting the other in achieving their goals.
- After both goal sheets are reviewed and discussed, supervisor and supervisee should agree upon the goals for the supervisee that year. Supervisee must submit these goals formally online after the meeting. Supervisor will review and approve the goals submitted online and will communicate with the supervisee to update the online goals as necessary throughout the year.
- At the completion of the meeting, both the supervisor and the supervisee will initial the checklist to indicate their mutual agreement that the meeting occurred.

Annual Review (January/February)

- Suggested video resource: [*Performance Review Foundations*](#)
- Before the annual review, the supervisor will send the supervisee an informal evaluation worksheet that includes the tasks and responsibilities which will be on the annual performance evaluation form. The supervisee should complete the worksheet and return to the supervisor no less than two business days prior to the actual annual review.
- Before the meeting, the supervisor will fill out the annual performance evaluations form and will review the performance self-assessment submitted by the supervisee. This will help the supervisor focus time and thought on any gaps between the supervisor's assessment and the supervisee's self-assessment.

- The supervisor will obtain their supervisor's signature on the annual performance evaluation prior to meeting with the supervisee.
- During this meeting, the supervisor and the supervisee will engage in the university's annual review process. This meeting should be reflective of the conversations that have taken place during meetings throughout the year. The supervisor will utilize the annual performance evaluation form as well as the supervisee's informal personal assessment.
- After the meeting, the supervisor will submit the signed copy of the evaluation via SendFiles to Brandie Pentecost for central maintenance of these records. The departmental HR representative will maintain the physical copy of the evaluation.

Review and Check-In (April/May/June)

- Suggested video resources: [*Coaching and Developing Employees*](#), [*Coaching Employees Through Difficult Situations*](#), [*Giving and Receiving Feedback*](#)
- Supervisor and supervisee will review the list of expectations. Both individuals are encouraged to discuss any expectations that have been difficult for the supervisee to achieve, or any expectations that have been beneficial to the employee to implement.

Questions during this meeting may include:

- Am I meeting your performance expectation and or mutual expectations we established?
- Is there anything that I need to start doing, stop doing, or continue doing to help us meet our goals as a department?
- What are one or two things that you think I need to improve on? What does improvement look like in these areas?

You may also want to share how you're feeling about:

- Current projects and workflow
- Communication flow
- Your professional relationship with coworkers and your supervisor

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- What have you learned about yourself this year?
- What do you enjoy about your work? What do you not enjoy?
- How do you feel valued in your role?
- The supervisor should consider closing the conversation by asking the supervisee how they can support them.

Review and Check-In (August/September)

- Suggested video resources: [*Coaching Skills for Leaders and Managers*](#), [*Improving Employee Performance*](#)
- Supervisor and supervisee will review the list of expectations. Both individuals are encouraged to discuss any expectations that have been difficult for the supervisee to achieve, or any expectations that have been beneficial to the employee to implement.

Questions during this meeting may include:

- Am I meeting your performance expectation and or mutual expectations we established?

- Is there anything that I need to start doing, stop doing, or continue doing to help us meet our goals as a department?
- What are one or two things that you think I need to improve on? What does improvement look like in these areas?

You may also want to share how you're feeling about:

- Current projects and work processes
- Communication styles and flow?
- Your professional relationship with coworkers and your supervisor

Morale

- What have you learned about yourself this year?
 - What do you enjoy about your work? What do you not enjoy?
 - How do you feel valued in your role?
- The supervisor should consider closing the conversation by asking the supervisee how they can support them.