

## FY12 Performance Review Checklist

PERFORMANCE PLANNING – (August 2011)	Yes	No	N/A
Review the Staff Member's (SM) job description, performance standards, related documentation, FY11 goals and results.			
Ask SM to think about the performance objectives they want to create for FY12.			
Schedule a meeting with SM to discuss performance objectives.			
For discussion eliminate all possible interruptions, email sounds, cell phone, pager, etc.			
Discuss performance objectives for the coming year, jointly agree on performance objectives and document them using the SMART Writing Technique.			
Review team, division, Advancement and University Strategic Goals.			
Develop a list of questions to engage your SM in the discussion.			
Close discussion with a summary by restating the new objectives and emphasize standards and expectations.			
Ensure the SM has an understanding of action steps, including completion times, standards, etc.			
Schedule a follow-up meeting to discuss future performance, goals, mentoring, etc.			
Speak with your Supervisor (a.k.a. second-level supervisor) to approve Performance Objectives.			
Review the Advancement website for resources and tools for the Performance Planning phase: <a href="http://www.advancement.osu.edu">www.advancement.osu.edu</a>			
Checkpoint: Has performance information been completed for the Performance Planning phase?			
MID-YEAR - (January 2012)	Yes	No	N/A
For discussion eliminate all possible interruptions, email sounds, cell phone, pager, etc.			
Discuss the first six months of the Performance cycle.			
When addressing performance be specific, give examples and use the SBO writing technique.			
Give the SM an opportunity to ask questions and to give feedback.			
Discuss performance goals for the coming six months. * If organizational priorities have changed jointly agree on new objective (s) and document them using the SMART Writing Technique. Speak with your Supervisor (a.k.a. second-level supervisor) to approve Performance Objectives.			
Review the Advancement website for resources and tools for the Mid-Year phase: <a href="http://www.advancement.osu.edu">www.advancement.osu.edu</a>			
Checkpoint: Has performance information been completed for the Mid-Year phase?			

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CHECK-IN – (APRIL 2012)	Yes	No	N/A
For discussion eliminate all possible interruptions, email sounds, cell phone, pager, etc.			
Discuss the first nine months of the Performance cycle.			
When addressing performance be specific, give examples and use the SBO writing technique.			
Give the SM an opportunity to ask questions and to give feedback.			
Review the Advancement website for resources and tools for the Check-In phase: <a href="http://www.advancement.osu.edu">www.advancement.osu.edu</a>			
Checkpoint: Has performance information been completed for the Check-In phase?			
YEAR-END – (July 2012)	Yes	No	N/A
Ask your SM to do a self-review prior to the meeting. Give a return date.			
Write an initial performance review with ratings.			
Consult with your supervisor on SM's performance ratings prior to delivering year-end review.			
For discussion eliminate all possible interruptions, email sounds, cell phone, pager, etc.			
Determine areas of excellence/improvement and note specific examples to discuss.			
Develop a list of questions to engage your SM in the discussion.			
Develop an agenda and objectives, select a time and place and communicate it to the SM.			
Plan how you will address a potential disagreement, if it occurs.			
Have the performance review available (2 copies) to share with the SM.			
State the agenda and objective for the performance review.			
During the review, use open-ended questions and listen.			
When addressing performance be specific, give examples and use the SBO writing technique.			
Give the SM an opportunity to ask questions and to give feedback.			
Submit signed original hard copy to your department's Human Resources representative by the deadline.			
Review the Advancement website for resources and tools for the Year-End phase: <a href="http://www.advancement.osu.edu">www.advancement.osu.edu</a>			
Checkpoint: Has performance information been completed for the Year-End phase?			