



Before the Conversation

- Document employee progress in Performance Notes throughout the quarter
- Reminder email comes to you about an upcoming Check-in for an employee you supervise
 - 30 days prior to due date
 - You may begin to enter information in the Check-in once you receive this email
 - Reach out to the employee to schedule the protected day/time for this Check-in
 - Place meeting day/time on both of your calendars
 - Confirm if the employee intends to submit a self-assessment prior to the in-person meeting
- Review your expectations and performance for this employee during the last quarter
 - Review the employee's self-assessment (if available)
 - Job roles/responsibilities
 - Work related behaviors
 - Performance notes from the previous quarter including accomplishments/concerns
- Prepare your mindset for this conversation
- Review Quarterly Check-In Guide for Leaders (think through/make notes to prepare)
- Draft the Check-In through UF Engaged (in the myUFL system)



Holding the Quarterly Check-in Conversation

- Create a supportive environment and tone to begin the conversation
- Engage in all 3 phases of the conversation
 - Document progress
 - Indicate areas to develop/improve
 - Identify goals/growth opportunities
- Ask open-ended questions that encourage dialogue
 - Aim for a balance of talking in the conversation (both parties contribute equally)
- Include specific feedback, focusing on the behavior you want to see more/less of in the future, not the person or their intentions
- Provide constructive feedback that is descriptive and directed to the action (not the person)
- Practice active listening and consider the employee's point of view
- Manage your emotions and stay in tune with theirs



After the Conversation

- Submit the employee's Check-In through the system prior to the deadline and inform the employee that it is available to view
- Follow-up with continuous, informal conversations throughout the next quarter
- Observe and monitor progress on agreed upon goals
- Provide resources and support as needed
- Document Performance Notes throughout the quarter