



Before the Conversation

- Document employee progress in Performance Notes throughout the six-month period
- Reminder email comes to you about upcoming Check-ins for all employees supervised
 - The leader may begin to enter information in the Check-in once they receive this email
 - A reminder email will be sent 7 days prior to the April and October deadlines
 - Reach out to every employee to schedule the protected day/time for this Check-in
 - Place meeting day/time on both of your calendars
 - Confirm that the employee will submit a self-assessment prior to the in-person meeting (the employee must submit their self-assessment before the leader submits their assessment document)
- Review your expectations and performance for this employee during the last six months
 - Review the employee's self-assessment (if available)
 - Job roles/responsibilities
 - Work related behaviors
 - Performance notes from the previous six months including accomplishments/concerns
- Prepare your mindset for this conversation
- Review UF Engaged 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
 - Discuss progress
 - Indicate performance opportunities
 - Identify goals and growth
- 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 six months
- Observe and monitor progress on agreed upon goals
- Provide resources and support as needed
- Document Performance Notes throughout the six month period