

Maximize

YOUR LEADERSHIP POTENTIAL



University of Florida Training and Organizational Development, Office of Human Resource Services

Making the Most of Quarterly Check-ins

This guide is designed to provide details about UF Engaged, the University of Florida's staff performance feedback process. UF Engaged was designed to encourage more frequent communication and information exchange between leaders and employees. Through Quarterly Check-ins, leaders and employees have brief conversations about progress toward goals, successes, and improvements.

Quarterly Check-ins are structured discussions between employees and their leaders that are designed to support employee success through reflection, planning, problem solving, and honest and constructive feedback. Based on the position entry date, each Check-in is designed to recap feedback that has been provided to an employee throughout the quarter. When conducting a Check-in, leaders should focus on the employee's successes, areas in which improvement can be achieved, and goals as well as development opportunities.

Ultimately, effective and continual feedback is designed to do two things: (1) reinforce positive work behavior so the employee will repeat the desired behavior in the future, and/or (2) redirect work behavior that needs to be improved so the employee can make adjustments moving forward.

An Overview of the Process

The University of Florida's Quarterly Check-in process for staff will cover a specific timeframe based on each employee's current position's anniversary date. When a Quarterly Check-in date approaches, both the leader and employee will receive reminder emails notifying them to login to the [myUFL](#) system to summarize performance for that quarter. Employees have the option to complete a self-assessment prior to their scheduled Check-in. The leader may then schedule a Check-in and complete a summary in the myUFL system. The Check-in must be reviewed with the employee prior to the last day of the quarter.

The Check-in Conversation

The Check-in conversation should last around 15 minutes and should be an open and interactive conversation about how the employee is doing (focusing on strengths and areas for improvement) and should include a discussion about a plan moving forward that addresses employee development, workplace needs, and goals for the next quarter. This conversation is all about discussing the nuts and bolts of how to make the employee and the team more productive, and providing the opportunity for the employee to move to the next level of performance.



Why feedback matters

For employees to remain engaged and to become high performers in an organization, they need to feel "connected" to their work and the workplace. That connection largely forms through the relationships of the employee with others in the workplace—both peers and leaders. Thus, the leader's ongoing feedback and the summary of frequent feedback through an official method is critical to how employees feel about their work and their commitment to an organization.

By the way, a leader does *not* have to wait for the Quarterly Check-in to have developmental conversations with employees. These conversations can and should happen all the time.

Check-in Format

Both the employee's self-assessment and the leader's assessment cover the following three topics:

- 1) Progress, strengths, events, and accomplishments
- 2) Areas where good performance can be elevated or where improvement is needed
- 3) Goals, career/skill development, and growth opportunities. No ratings are assigned; all sections should be in narrative format.

Any leader who recognizes significant deficiencies in an employee's performance that needs immediate attention should contact the [Employee Relations satellite office](#). Special Performance Improvement Plans can be initiated to address more challenging performance issues.

Probationary Period

A six-month probationary period is required for all staff in their initial hiring at UF, or when they transition from USPS or OPS positions. Probationary Check-ins follow the same quarterly timeframe as all other Check-ins. The first Check-in will be the Probationary Midpoint Check-in conducted at the three month mark. Then, a Six-Month Probation Check-in will be conducted *prior to* the actual end of the probationary period. At this time, the leader will determine if the employee has successfully completed the probation, or if a probationary extension is warranted. If successful completion of probation is selected, the employee will continue to follow the normal Quarterly Check-in schedule and process. If an extension of the probation is being considered, the leaders will work with their Employee Relations Satellite Office before submitting the probationary extension. Probation periods may only be extended in three month intervals and may only be extended twice, not to exceed 12 months. If an employee is not performing successfully in the position, the supervisor can consult with Employee Relations to discuss if a Probationary Dismissal would be an appropriate action. Probationary Dismissals can be executed at any time, regardless of the scheduled Check-in, after consultation with Employee Relations.

Remember, no performance ratings will be assigned, so it is important for the leader to continuously communicate with probationary employees and monitor their progress toward mastering the position and demonstrating the ability to be a productive and valuable member of the team.

Supervisor Responsibilities

Preparation

When leaders receive an email notification that a particular employee's Quarterly Check-in is available, they should schedule a Check-in meeting. The email will include the due dates involved within the current quarter. It is important to choose a convenient time and place for the meeting. Ensure the location will be comfortable for everyone and provides privacy. In order to provide meaningful performance feedback, be sure to reserve protected time so the meeting doesn't feel rushed and there aren't distractions or interruptions.

Next, the leader should reach out to the employee to discuss when, and if, the employee intends to complete a self-assessment. It is important the employee has the time needed to complete a self-assessment (optional, but encouraged) as the opportunity to submit information within this format ends when the supervisor clicks on the 'submit' button on the Check-in. The leader should review the employee self-assessment entries made within the Performance Notes section in myUFL and any other documentation that reflects the efforts of the employee over the course of the quarter. A draft of the Quarterly Check-in can be started in the system in preparation for the meeting.

The Check-in Meeting

In addition to reviewing the past quarter's performance, the conversation should include an emphasis on growth and development as well as progress on performance goals. Both parties should contribute equally to the conversation. The leader should ask open-ended questions when appropriate to facilitate involvement of the employee in this discussion.

Summarizing the Check-in

Providing feedback on the employee's performance, should be specific and focus on the behavior, not the person. Consider these tips when preparing feedback:

- Summarize progress, strengths, events, and accomplishments:**
 - Recognize good performance
 - Include progress toward goals
 - Mention strengths exemplified by actions throughout the quarter
 - Discuss events the employee was a part of or organized
 - Review what was done and accomplished
 - Describe recent education and training completed
 - Include special assignments and projects as well as participation in task forces and committees
 - Include outcomes and results with numerical data when applicable
- Indicate areas where good performance can be elevated or where improvement is needed:**
 - Indicate areas in which potential development is possible
 - Highlight techniques or processes where improvement is needed
 - Note areas of overall performance that may be deficient
 - Clarify expectations for acceptable behavior
- Identify goals, career/skill development, and growth opportunities:**
 - Provide an action plan and/or resources to help the employee improve
 - Discuss potential training, conferences, and development resources
 - Set reasonable goals to work toward during the next quarter
 - Create growth opportunities to focus on during the next quarter, such as:
 - Taking part in meetings on specific topics
 - Performing duties that expand knowledge of and role in the department
 - Identify professional development opportunities
 - Recommend coaching or mentoring supports

Setting Goals

Establishing goals and objectives makes it clear what a leader expects of an employee. It also develops the employee and advances the organization. The goals should be challenging yet relevant to the work of the employee. To create performance-based goals, consider using the SMART goal criteria:

- Specific**- Make them as specific as possible.
- Measurable**- What will success look like?
- Aggressive and Achievable**- Give them room to stretch and grow.
- Relevant**- Make sure they focus on outcomes that matter most.
- Time-bound**- When will progress be discussed?

Helpful Hints for all Sections

- Refrain from statements of beliefs and philosophies
- Use specific examples, but not the same ones repeatedly (consider the entire quarter)
- Provide context
 - Describe the climate or environment surrounding the situation, problem, or goal
- Use clear, direct language

Avoid Major Evaluator Errors

- **The Halo/Pitchfork Effect.** Allowing one good deed or bad incident to color the entire Check-in
- **The Recency Effect.** Failing to assess performance for an entire quarter and focusing only on the past few weeks
- **Compatibility.** Using friendship or lack of friendship to affect the content in the Check-in
- **The Central Tendency.** Writing all Check-ins in a similar fashion

Throughout the Quarter

Providing continuous performance feedback to employees is a leadership imperative. Nothing on the Check-in should be a surprise—rather it should be a way to summarize the feedback provided all along in a more formal way.

Conclusion

Performance management, and specifically the Check-ins, are a key component for effective and ongoing employee development. This process ensures employees receive reinforcement for those skills and accomplishments that are important for the efficient and effective functioning of the work group, while also providing information about those areas of performance that are not as strong and/or need attention for growth and development. Lastly, the Check-ins provide an opportunity for employees and their leaders to talk about goals moving forward.

If you have questions at any time about UF Engaged, please feel free to email us at EmployeeRelations@hr.ufl.edu or contact your Employee Relations office:

- Education and General, Auxiliaries (352) 392-6615
- Health Science Center (352) 392-3786
- Business Affairs (352) 392-2333
- IFAS and Veterinary Medicine (352) 392-4777

Your understanding of the process and responsibilities as a leader will ensure your employees receive clear, timely, and meaningful feedback that enables them to be more connected to their role, know that the work they do is valued, and identify ways to grow, develop, and thrive.