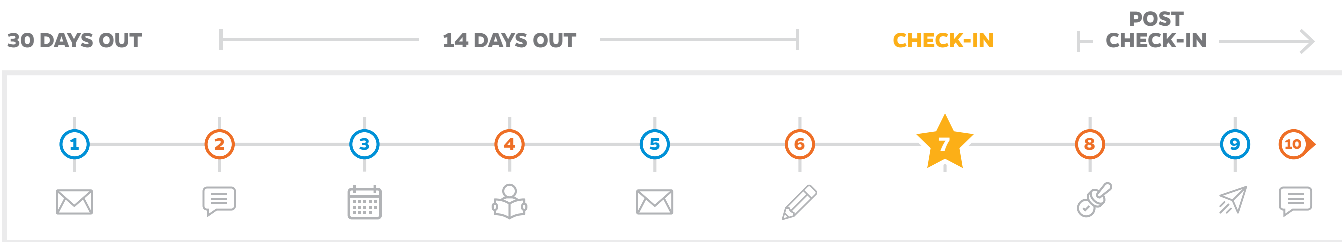
UF ENGAGED

CLEAR | TIMELY | MEANINGFUL

CHECK-INS AT-A-GLANCE



1. Leader and Employee receives Email Notification approximately 30 days prior to due date

These emails will come on **Monday** of the week within which the 30 day advance notice from the end of the quarter falls.

2. Leader should have a conversation with the employee to ensure they received their email reminder and mention that they anticipate the employee completing the self-assessment within the next two weeks

Supervisor should ***ask the employee*** to let them know when they actually **complete the self-assessment.**

3. Leader sends a calendar invite to employee, indicating Check-in meeting.

This meeting should be scheduled to align with availability **within 5 business days of the end of the quarter** as indicated on the document taking into account scheduling issues that include such things as vacations, business travel, and holidays.

4. Employee completes/submits Self-Assessment Check-in, if applicable
(Note: an employee has a 'soft due' date of two weeks prior to the actually due date)

Employee should **notify their supervisor** that they have completed and submitted their self-assessment.

5. Leader receives Email Reminder approximately 14 days prior to due date.
(NOTE: EMPLOYEE WILL NOT RECEIVE THIS SECOND EMAIL REMINDER.)

If the supervisor has **not heard from the employee**, they should check with them to encourage them to complete the self-assessment as soon as possible.

6. Leader completes but does not submit Check-in

Supervisor should remember to **hit "Save" frequently** after updates are made to the employee's Quarterly Check-in. Supervisor should find what style works **best for them.** (ie, narrative format; bulleted talking-points, etc.)

7. Leader and Employee have Check-in meeting

This should be a dialogue between the supervisor and employee discussing **all aspects of the bulleted topics** that are noted in both the **employee self-assessment AND the supervisor's prepared Check-in.**

Remember, it is a dialogue, not a transaction. HOWEVER, the supervisor should ensure they are clear and timely in giving their feedback and expectations to the employee.

8. Leader finalizes Check-in, including any relevant content discussed during Check-in meeting

Ensure this is completed **BEFORE the end of the quarter** as indicated on the Check-in.

9. Leader submits Check-in

Supervisor lets employee know they have submitted the final version of the Check-in and it can be found in the **"Historical Documents" section of UF Engaged.**

10. Supervisor continues to communicate with the employee over the course of the next quarter.

This includes adding information within "Performance Notes" to document all aspects of the employee's performance in the UF Engaged system. Entries in Performance Notes can indicate **both good and bad performance**, including entries about areas that can be improved, and entries noting training or development opportunities that the employee should know about.

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CHECK-INS AT-A-GLANCE
(Leader View)

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**