

A photograph of a roller coaster car with several passengers upside down, set against a clear blue sky. The car is yellow and green, and the passengers are wearing blue and red clothing. The roller coaster track is visible in the foreground, curving upwards.

UF Engaged: A Conversation- Centered Campaign That Turned Performance Management on Its Head

By Dr. Kevin Clarke, Brook Mercier and Amber Wuertz



Editor's note: Although the University of Florida developed its new performance management approach before the COVID-19 pandemic, many of the new measures they have implemented are well-suited to our new workplace reality, including the need to conserve resources and manage remote workers, while strengthening relationships and increasing engagement between supervisors and employees.

If you asked employees of the University of Florida (UF) about the staff performance appraisal system in place until 2017, you would not be impressed with their answers. We know, because we asked, and the responses were brutally honest.

Terms like “antiquated,” “painful,” and “time-consuming” were commonly seen in feedback about the process. “It was almost like there was a sense of dread each year for both leaders and employees,” stated one employee.

So how did the University of Florida move from a bureaucratic, time-wasting process to an award-winning approach to performance management?

The story began in 2017 when Jodi Gentry, vice president for University of Florida Human Resources (UFHR), forged a strategic commitment centered on the concept of “preeminence through people.” One of the specific goals that came from the commitment was that UFHR would support the university’s efforts through an

aligned and contemporary approach to performance management that focuses on fostering high performance. Gentry’s vision became a guiding principle for UFHR’s work in the years to come.

A Problem Meets an Opportunity

At UF, Employee Relations oversees the staff performance management process. As Employee Relations surveyed the landscape in 2017 and considered what performance management looked like at the university, Gentry challenged the department to use the opportunity to revolutionize the way performance was thought about, talked about, measured, and especially, how performance could be improved.

Looking back, we were given an incredible opportunity, but at that moment in time, we realized that our existing evaluation system was an obstacle to achieving the goals of our strategic commitment.

The old staff evaluation process was completely on paper with no web-

based options, which led to manual processing and way too many filing cabinets. The old system utilized five ratings: exceeds performance standards, above average performance standards, achieves performance standards, minimally achieves performance standards, and below performance standards.

However, performance that was “above average” for one supervisor might have been “average” for another due to the subjective application of ratings. The annual evaluations were conducted in March each year, which made the entire month very unproductive as supervisors spent an inordinate amount of time writing evaluations for each one of their employees. Having to recall information from the past year for each employee was time consuming and, frankly, not worth the time required to write the evaluation.

“Most concerning of all was that we, in HR, were promoting an HR-centric system that was forcing supervisors into ineffective leadership behaviors,” says Dr. Kevin Clarke, associate director in Employee Relations and past president of the CUPA-HR Florida Chapter.

Once UFHR was ready to make significant changes, the question on everyone’s mind was “What now?” UFHR knew that the system was broken. We found that between comments, questions and complaints from every corner of campus, the old system was loathed by many, with little faith in the system that we invested so much time and effort in each year. HR professionals can sometimes be resistant to change, but UFHR fully

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embraced the moment and made the bold decision to turn performance management on its head.

The Transition

With the March 2018 evaluation cycle looming, attention shifted to disrupting the old routine. Many ineffective habits had been ingrained in the staff evaluation for many years, and the team didn't want those practices to linger in the cultural memory of the institution. UFHR took the drastic step of making performance evaluations voluntary for 2018. Not surprisingly, some units complained, and some continued using the old system either out of habit, out of the realization that they needed a method to document issues with employees, or to have the crutch to lean on for determining merit raises.

Concurrently, Employee Relations conducted a survey of supervisors and staff employees to publicly validate concerns about the old evaluation system, and more importantly to determine what was most needed in a new performance management program. One of the glaring low points of the survey was that 44 percent of supervisors who responded were either somewhat or extremely dissatisfied with the old evaluation process. In general, the survey indicated that UF supervisors and employees were not equipped to facilitate meaningful conversations about performance and goal setting in a timely and effective manner. The survey confirmed that employees needed more frequent feedback, and supervisors needed support to become more effective at giving performance feedback.

As a byproduct of our research, we found that we had lost sight of why we evaluated performance. Most telling was that many supervisors gave high evaluation ratings to avoid difficult or uncomfortable conversations, and many supervisors didn't have the tools or expertise to have those meaningful discussions. Administrators were also concerned that evaluation ratings were needed to determine merit raises, which are infrequent at the institution and were never timed with the March annual evaluation cycle.

Employee Relations conducted focus groups with stakeholders across the institution to openly discuss what a better system would look like, and then conducted a review of peer institutions across the country. Interestingly, many peer institutions were grappling with the same ineffective staff evaluation process UF had been using. A review of performance management practices in the corporate world found that the best organizations had ended laborious evaluation systems, instead focusing on fostering and efficiently documenting the engagement between the supervisor and employee.

It's a Philosophy, Not a System

As you consider your own institution's performance management system, consider the use of the word "system." Early on, UFHR realized that performance management is not a system; it is a philosophy that represents the performance culture of an organization. If we're honest, systems are ineffective because there's a lack of meaningful engagement happening in the

fundamental relationship between the supervisor and the employee. If the supervisor and employee relationship is broken, or even misaligned by a few degrees, HR efforts won't be as effective. What we found, and ultimately used as the foundation of building a new outlook on evaluations, is that performance management is not about a system, but rather about the results that can be achieved by focusing on the communication and development of the employee-supervisor relationship.

With the support of the vice president, UFHR was given a blank slate to design a new performance management approach. We recognized the need for a nimble approach that would increase engagement between supervisors and employees, and ultimately increase the productivity and effectiveness of human resources of the university. We also knew we could not simply reissue something similar with new window dressing. Instead, we had to think outside of the box, find something that would align HR with the institutional goals of preeminence, and do it simply and effectively. Further, we had to focus on adding value to supervisors' feedback and contributing to the pursuit of a positive workplace that increased employee job satisfaction and advancement potential. Ultimately, we wanted to create a way to encourage the exchange of supportive, constructive and timely interaction between supervisors and employees.

UF Engaged Was Born

We knew it was important to return to the basic foundational

principle of that professional relationship between the employee and the supervisor by focusing on the engagement necessary for that relationship to be successful. To build on this new concept and cultural change, the team created a new brand that could have an entirely new performance culture and framework built around it: UF Engaged. UF Engaged represents the philosophy of supporting engagement between supervisors and employees, achieved through providing clear, timely and meaningful feedback.

The essence of UF Engaged is an ongoing conversation about performance and development between employees and supervisors. The team designed UF Engaged to focus on more frequent, structured conversations known as quarterly check-ins. These quarterly conversations are anchored to the employee's position entry date, which distributes the check-ins throughout the year and avoids a single due date for everyone, which was a flaw in the old system. The quarterly approach encourages a shift in the culture by encouraging continuous engagement rather than an annual evaluation event.

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Quarterly check-ins also feature an employee self-assessment, which fosters two-way feedback critical to success and reinforces that this communication is a conversation, not a transaction.

Three Core Objectives

UF Engaged guides leaders and employees to discuss three core objectives:

- 1. Document progress, strengths and accomplishments** – Recognize where things have gone well during the quarter. Good work should be acknowledged and celebrated!
- 2. Indicate areas where good performance can be elevated or where improvement is needed** – While areas of unsatisfactory performance may not exist for every employee, there are always opportunities to take performance to the next level.
- 3. Identify goals and needed career skill development and growth opportunities** – This objective can provide agreed upon strategies to foster development and short- and long-term goals for employees who are performing at a high level, or may address short-term goals and expectations for required improvement for employees who are not meeting performance expectations.

The three objectives are intentionally broad, allowing departments to tailor their objectives to meet departmental priorities or specific employee needs without a cumbersome HR form that pigeon-holes into specific categories that may not apply to the employee.

The expectation is that the quarterly check-ins do not mirror the old process, but rather serve as a 15-30 minute conversation discussing pertinent points that are relevant to each quarter.

UF created the UF Engaged structure within PeopleSoft's ePerformance 9.2 module. The result is a very user-friendly tool, which includes not only the quarterly check-in, but probationary employee check-ins, a performance improvement plan feature, and a module for performance notes to document specific items during the quarter that can be used in preparing for the check-in.

The system is fully automated to send email reminders to supervisors and employees about upcoming quarterly check-ins, and maintains a historical record of all activity. Although the PeopleSoft system was designed to facilitate UF Engaged, an institution can use the strategies and theory of UF Engaged within any system or environment.

A Campaign for Change

Given the complexities of replacing a legacy evaluation system and starting from scratch, the team knew that an all-out campaign was required to be successful.

“The successful implementation of UF Engaged was achieved through a team effort,” recalls Amber Wuertz, management analyst for UFHR's Office of Strategic Initiatives and UF Engaged project manager. Also contributing to the effort were colleagues from Employee Relations, Training and Organizational Development, UF Information Technology, and HR Liaisons from other campus units. UFHR

Communications designed the UF Engaged logos and facilitated a change-management plan, including a comprehensive communication plan to maximize the efforts of the team. The Employee Relations team then took the show on the road by presenting UF Engaged to countless departments, employee groups and leadership teams.

Promotional and instructional videos were produced to amplify the message, and partners across campus were involved in user-acceptance testing in PeopleSoft to ensure that the implementation of the tool would be error free.

Creating Tools for Growth

In the months before UF Engaged was launched, a tremendous effort was focused on delivering resources that would better equip supervisors to have meaningful conversations.

At an institution with thousands of staff employees and hundreds of supervisors, UF recognized that many supervisors have great success engaging with employees, while others have challenges with engaging on a consistent basis. UF Engaged was designed to support all managers and employees in their professional growth and lead them toward higher engagement and performance.

To help foster a culture of performance engagement among supervisors and employees, UFHR created a UF Engaged website, numerous toolkits, informational articles, check-in guides and other helpful tools to encourage collective growth. UFHR's Training and Organizational Development department incorporated UF Engaged into several existing courses

to ensure that the philosophy would be integrated into training opportunities. Further, UFHR Communications produced a series of communications called "One Conversation" to inform and prepare supervisors and employees for the initiative.

The team celebrated the culmination of months of hard work when UF Engaged went live in October 2019 with the first quarterly check-in completed in January 2020. The University of Florida was recognized for these successful efforts by receiving the 2020 CUPA-HR Southern Region HR Excellence Award for UF Engaged.

Past, Present and Future

A common question UFHR is asked is whether UF Engaged refers to the past, present or future. The answer is that it refers to all three.

UF Engaged provides supervisors and employees with the opportunity to discuss past performance and set future goals rather than waiting an entire calendar year for the evaluation. The initiative also represents the present relationship between a supervisor and employee engaged in a productive and meaningful professional relationship. Lastly, UF Engaged charts the future through meaningful discussion about what success will look like as a result of growth-oriented goal setting.

Campus feedback on the initiative has been very supportive, including praise from the president of the university. Employee Relations monitors quarterly check-in completion rates across campus, which have been very encouraging,

and that information can be used to identify areas of campus where additional support or guidance may be appropriate.

Refilling the Tank

For one team member, the impact of UF Engaged was immediate. As Wuertz shared during the presentation of UF Engaged at the CUPA-HR Virtual Annual Conference in October, "I didn't realize how much I needed my emotional tank refilled. That helps you remember why you love your job!"

Wuertz shared that with UF Engaged, she and her supervisor have intentional conversations about her as a professional, allowing her to self-reflect on where she can improve, and helping her set aside time to think about and discuss professional goals and opportunities for growth.

The success of UF Engaged is changing the culture of performance at UF and will be measured long-term. Mercier states that "Although we were very proud of the work to launch UF Engaged, we know the real work in shifting the culture is yet to come, and we know that the benefits of UF Engaged will be realized over many years, one conversation at a time, focused on performance and outcomes. UF Engaged is about the conversation!

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