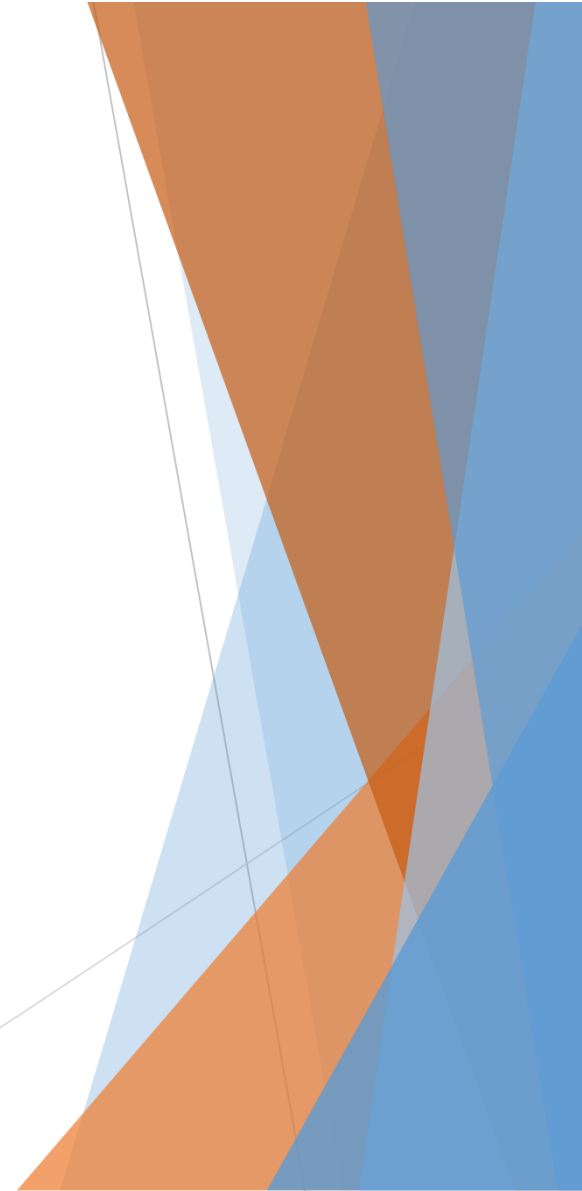




Manager Training

Agenda

- ▶ UF Engaged Overview
- ▶ Performance Notes
- ▶ Document Types
- ▶ Format
- ▶ New Employees
 - Mid-Point Check-in (3 months)
 - 6 month Probationary Check-in (6 months)
- ▶ Existing Employees
 - Quarterly Check-in
 - Special Performance Improvement Plan



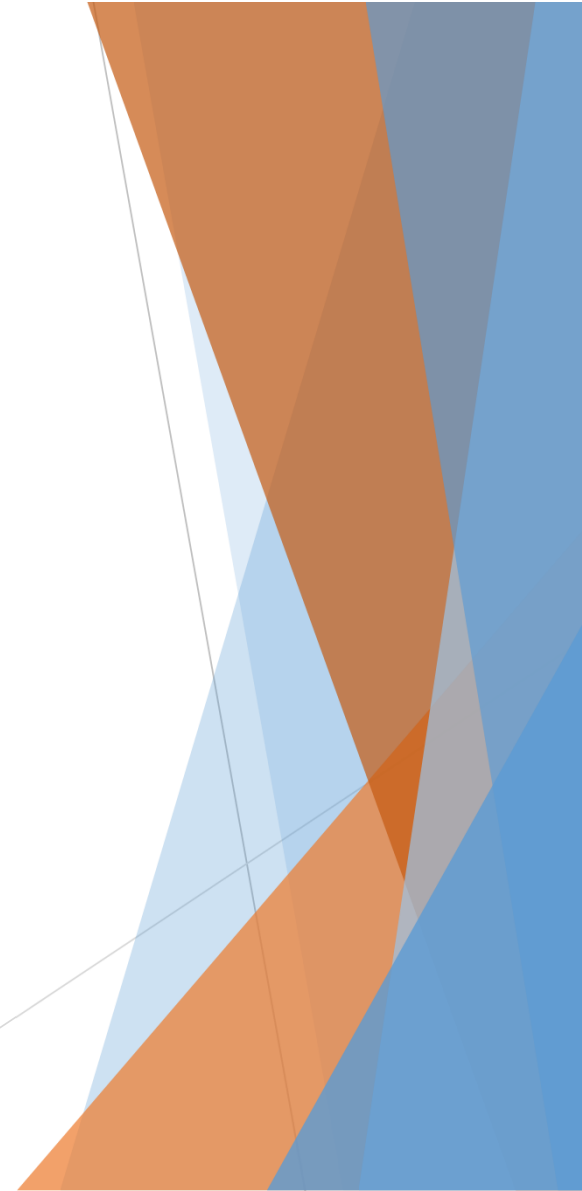
Overview

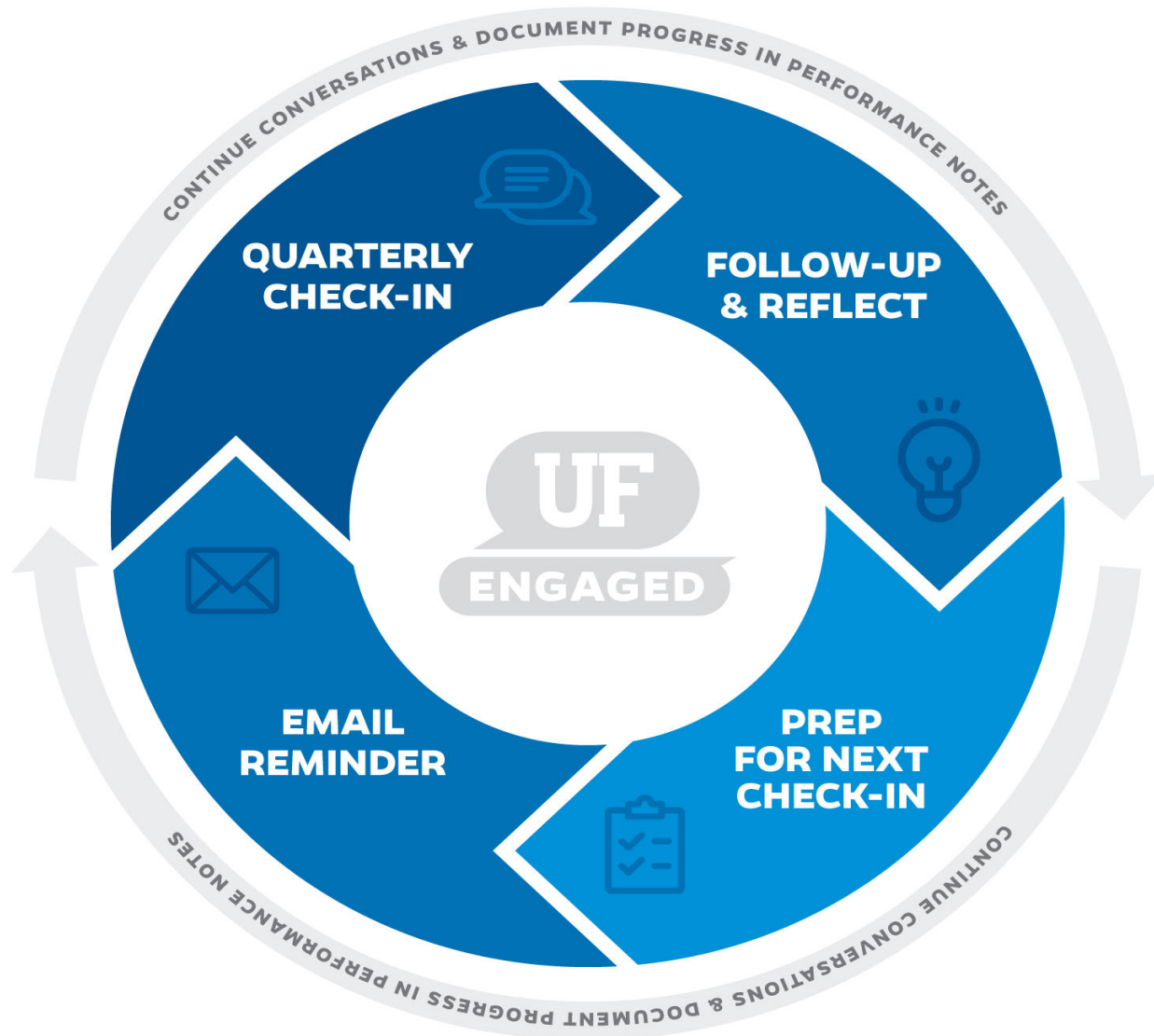
- ▶ Ultimately, effective and continual feedback is designed to do two things:
 - Reinforce positive work behavior so the employee will repeat the desired behavior in the future, and/or
 - Redirect work behavior that needs to be improved so the employee can make adjustments moving forward.
- ▶ Designed to support employee success through clear, timely, and meaningful feedback about performance.



UF Engaged

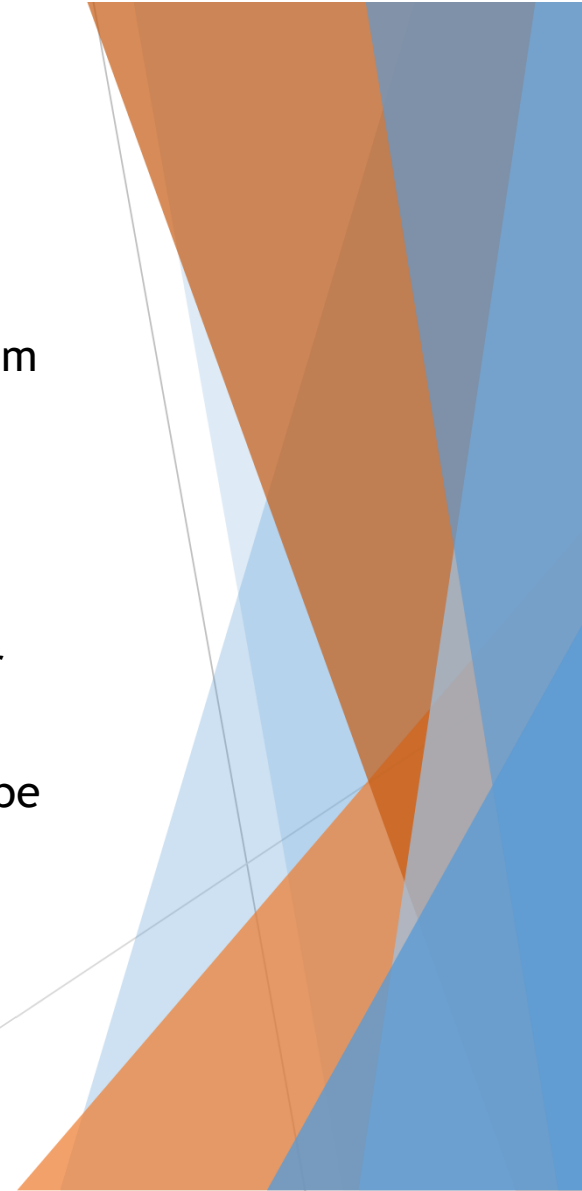
- ▶ Supervisors & Staff will receive email notifications
 - One Month Prior and Two-weeks Prior to Check-in Due Date
- ▶ No rating levels/categories
- ▶ Spell Check Feature
- ▶ “Check Language” Feature





Performance Notes

- ▶ Performance Notes is a tool for leaders within the UF Engaged system to keep personal notes and track events regarding their employees' performance.
- ▶ Employees can keep personal notes and track events involving their own performance.
- ▶ Performance Notes should be used as a resource when preparing for Quarterly Check-ins.
- ▶ The content of Performance Notes, and any attachments, will only be accessible to the user who entered the information.



Performance Notes

- ▶ Some key components of clear and effective documentation:
 - ▶ Significant events-both successes or failures
 - ▶ Facts of the situation, noting objectives in addressing the situation, suggested solutions, and what actions you would like to see occur.
- ▶ Define a specific behavior or result for the employee in measurable terms against which you (and the employee) can gauge performance.
- ▶ **Performance Notes is not a substitute for having continuous conversations or for conducting Quarterly Check-ins.**

Current and Historical Document Types

▶ Document Types:

- Mid-Point Probation Check-in
- Six Month Probation Check-in
- Extend 9MO Probation Check-in
- Extend 12MO Probation Check-in
- Quarterly Check-in
- Special Performance Improvement Plan

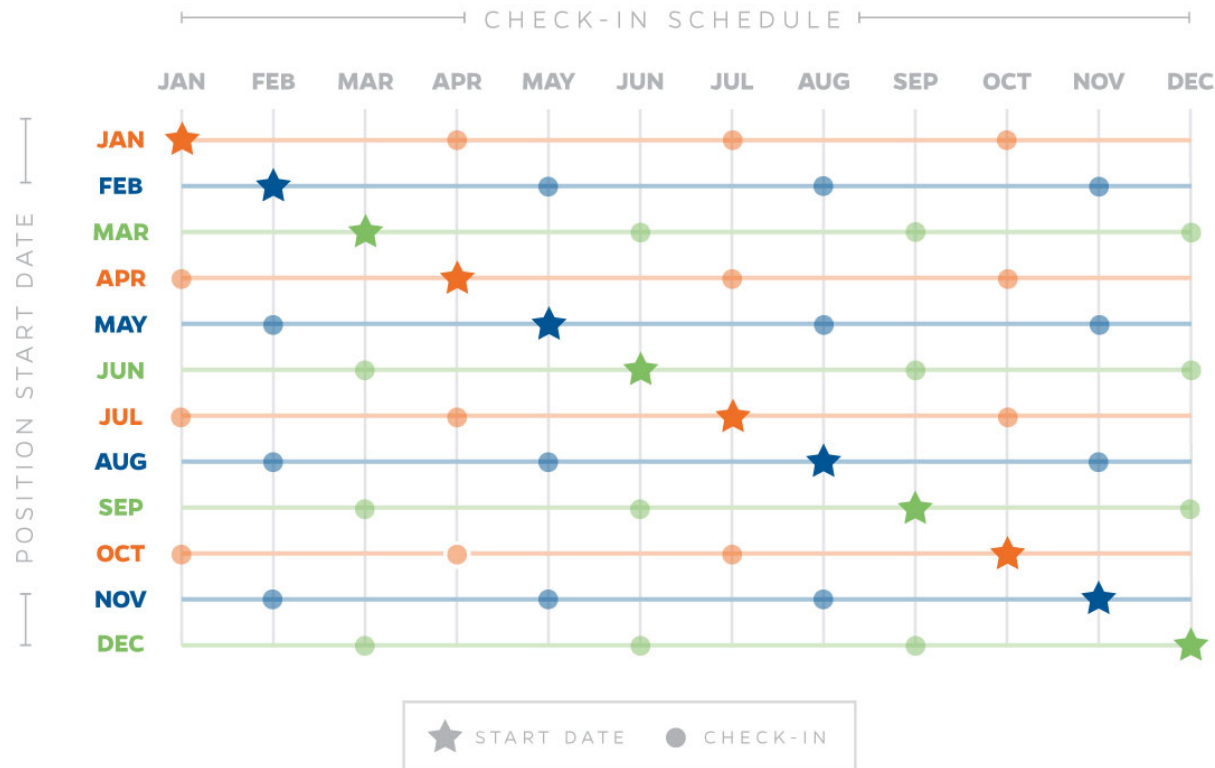
▶ Document Status: Evaluation in Progress or Approval

▶ Historical Documents Status: Completed or Cancelled

- Enables you to view all historical documents related to the direct and indirect reports within your chain of supervision.

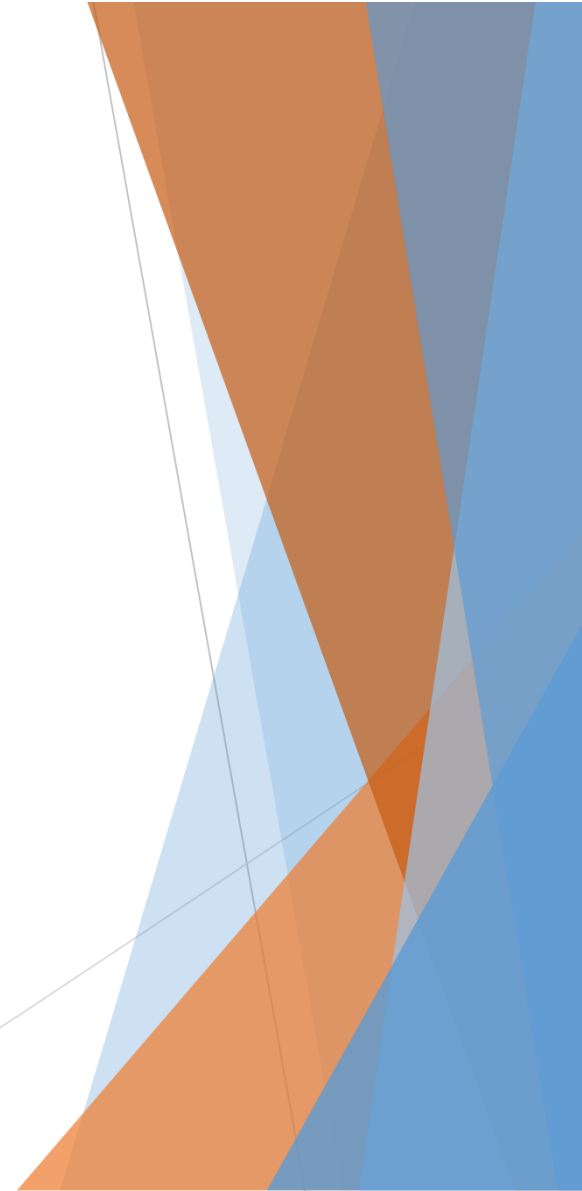
UF Engaged Check In Schedule

- ▶ Based on employee anniversary date
- ▶ Available to supervisor 30 days prior to due date



Format/Questions

- ▶ Document progress, strengths, events, and accomplishments
- ▶ Indicate areas where good performance can be elevated or where improvement is needed. Provide a plan of action, if desired or appropriate
- ▶ Identify goals, needed career/skill development, and growth opportunities



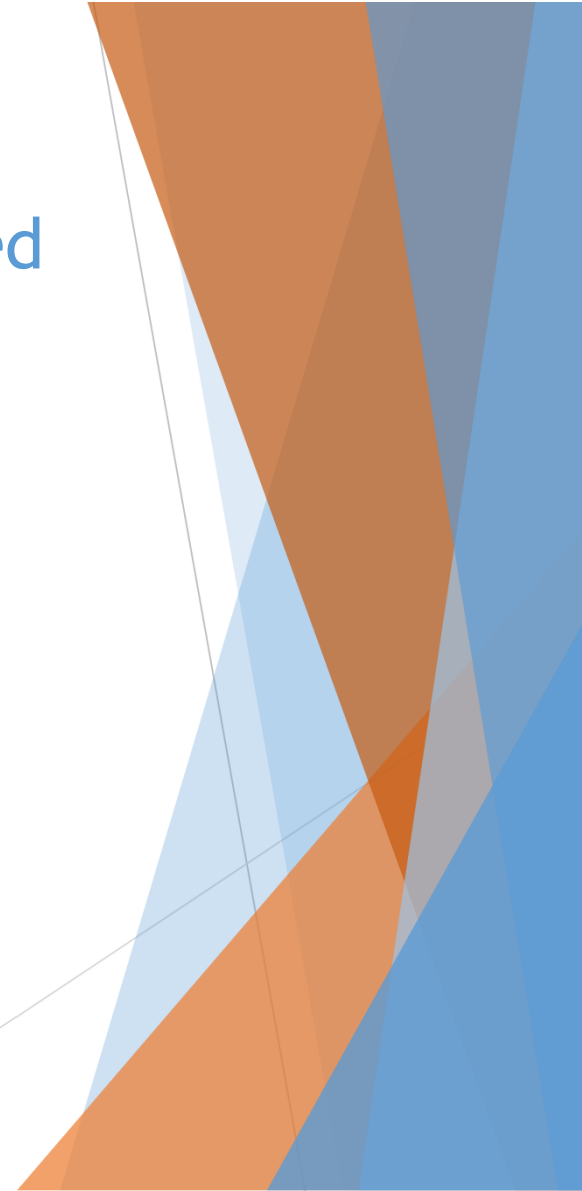
Document progress, strengths, events, and accomplishments

- ▶ 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



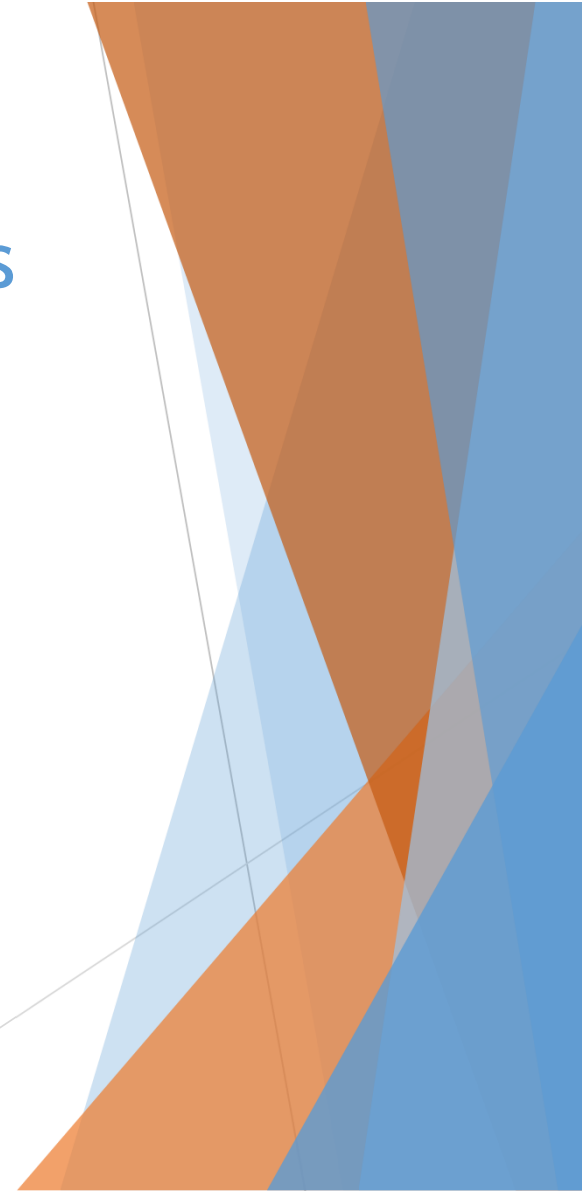
Indicate areas where good performance can be elevated or where improvement is needed

- ▶ 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 (SMART Goals)
- ▶ 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



Check-in conversation

- ▶ Through Quarterly Check-ins, leaders and employees have brief conversations about progress toward goals, successes, and improvements.
 - ▶ Should last around 15 minutes.
 - ▶ Should be an open and interactive conversation about how the employee is doing (focusing on strengths and areas for improvement).
 - ▶ 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.
- ▶ **Note:** If you prefer to have something printed for your check in conversation you can print in word prior to meeting.

Document Progress

Provide Helpful Feedback

- Recognize success
- Provide specific feedback regarding observed performance
- Acknowledge strengths/talents/abilities

Which Sounds Like

Let's talk about your progress this quarter.

- ▶ Here are some examples of areas in which you are doing well...
- ▶ Some accomplishments you've achieved this quarter are...
- ▶ You contribute to the success of our team by...

Ask Some Guiding Questions

What motivates you in your current role?

In what areas did you meet your professional goals?

What accomplishment are you most proud of this quarter?

Indicate Areas to Develop

Provide Helpful Feedback

- Identify areas of performance to improve
- Clarify areas of performance to elevate
- Provide specific behavioral examples and a plan of action (if appropriate)

Which Sounds Like

- ▶ Here are some areas of good performance that can be elevated...
- ▶ The skills and/or talents you need to use more effectively are...
- ▶ Areas that need improvement are...

Ask Some Guiding Questions

What part of your job is the most challenging? Why?

In what areas did you not meet the level of performance you would have liked to achieve?

Where do you think you could improve?

Identify Goals/Growth Opportunities

Provide Helpful Feedback

- Identify targeted areas for further development
- Set goals that are measurable and achievable
- Focus on specific actions to reach goals

Which Sounds Like

- ▶ Here are the goals identified for you to work on in the next quarter...
- ▶ I would like you to focus on gaining additional knowledge and/or experience in _____ (area/competency) ...
- ▶ This quarter I will provide _____ (support/resources) to help you achieve your goals...

Ask Some Guiding Questions

What skills are you looking to develop?

What professional growth opportunities interest you?

What are two to three things I could do to help you meet your goals?

Check-ins

- ▶ Encourage employees to complete self assessment each quarter
- ▶ Schedule a meeting time
- ▶ Prepare and plan for your meeting
- ▶ Meet in a private location free of distractions
- ▶ Begin and end with a positive
- ▶ Encourage open discussion
- ▶ Remind employee to update/turn in any “Disclosure of Outside Activities”
- ▶ Record meeting in myufl

- ▶ **BEST PRACTICE:** Have the Quarterly Check-in conversation prior to submitting documentation in myufl. Please consider if any additional information should be added as a result of the Quarterly Check-in conversation.

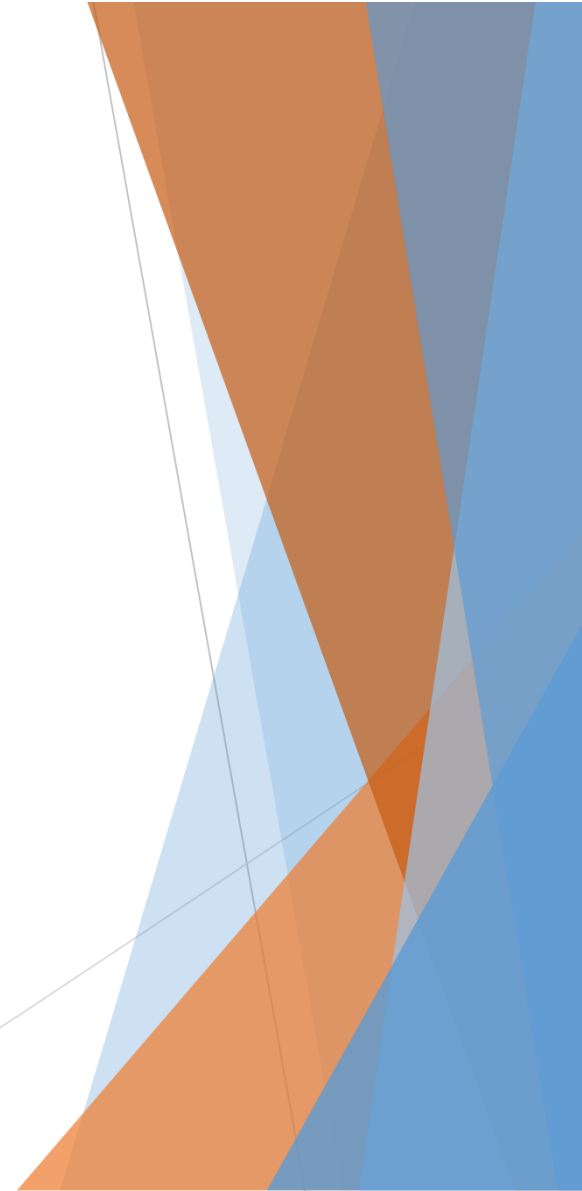
- ▶ [Resources for UF Leaders](#)

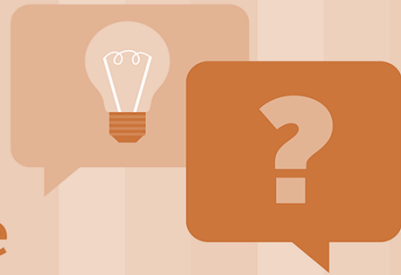
Six-Month Probation Check-in

- ▶ Due date is five days earlier than the end of the review period
 - ▶ The five day period allows for HR to review in the case of a request for an extension.
 - ▶ If you do not complete the Probation Check-in by the date listed under Next Due Date, the employee will default to have successfully completed their probationary period
- ▶ Supervisors have two choices:
 - ▶ Successfully Completed, or
 - ▶ Probationary Extended
 - ▶ Outside of UF Engaged: can request a probationary dismissal
 - ▶ If you are considering extending/dismissing, please contact UFCD HR. Both must be preapproved by HR.
- ▶ Probation periods may only be extended in three month intervals, not to exceed 12 months
- ▶ **Discuss any performance issues with UFCD HR prior to the end of the probationary period.**

Special Performance Improvement Plan

- ▶ Can be initiated at any time
- ▶ Contact UFCD Human Resources
- ▶ [Instruction Guide](#)





How to Give Effective Feedback

- ▶ Focus on observable acts, not attitude
- ▶ Specific
- ▶ Inquiring
- ▶ Timely
- ▶ Direct towards the future
- ▶ Goal oriented
- ▶ Supportive
- ▶ Continual
- ▶ **BEST PRACTICE:** Feedback should be continuous, do not wait until a Quarterly Check-in to provide reinforcing or redirecting feedback.

Establishing Goals



- Should be distinct from daily or routine activities and job duties.

SMART Goal Criteria

Specific - Make them as specific as possible

Measurable - What will success look like?

Aggressive and Achievable - Give employees room to grow

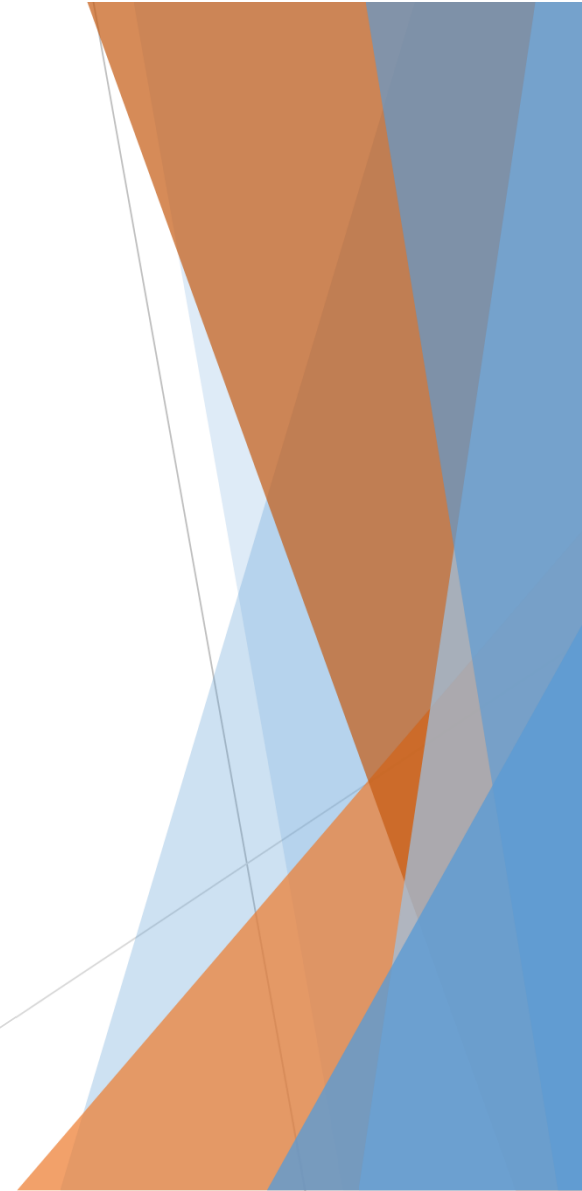
Relevant - Make sure they focus on outcomes that matter most

Time-bound - When will progress be discussed?



Resources

- ▶ [UF Engaged Resources for UF Leaders](#)
- ▶ [Quarterly Check-in for Leaders](#)
- ▶ [Making the Most of Quarterly Check-ins](#)
- ▶ [Performance Notes for Leaders](#)
- ▶ [Manager Tasks for Performance Documents](#)
- ▶ [Tips to have Difficult Conversations](#)



Leadership Resources/ Training Courses

- ▶ [Power of Feedback](#)
- ▶ [Coaching for Success](#)
- ▶ [Accountability in the Workplace](#)
- ▶ [Leading with Courage](#)
- ▶ To search for trainings go to my.ufl.edu-Main Menu-My Self Service-Training and Development-Mytraining

Questions?

